

Annotated Report Guide for...

Financial Progress Snapshot - Goal Coverage

Financial Progress Snapshot - Goal Coverage

Use this report to track multiple goals' progress and see if they are current able to meet needs.

1 *where you should be tracking* is a visual representation of where assets should be at in order to meet need in the future.

2 *1st Year Goal Needs* is the amount of income needed to fund the 1st year of each goal 100%. This value will always be in today's dollars.

3 *Are You On Track* checks the total need versus how much you will have available to meet your goal's needs. If there are enough funds, this section will say **Yes**. If not, the column will say **No**.

4 *Goal Start Date* lists the beginning date of the goal. This is setup with each of the goal pages within **Set Goals** of the approved plan.

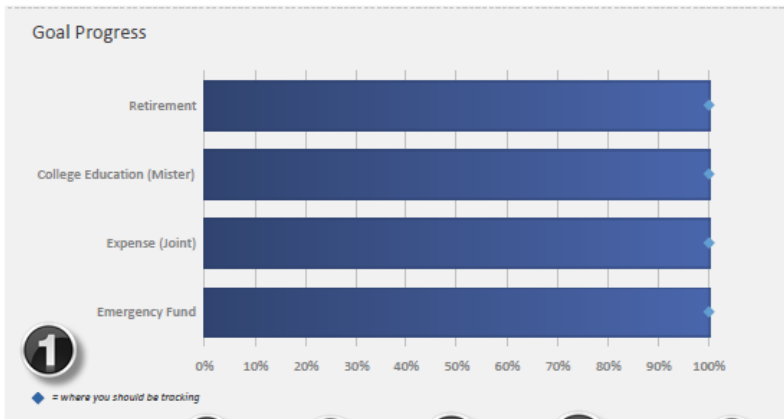
5 *Where Are You Tracking* lists percent coverage of the goal based on the assets currently available.

6 *Where You Should Be Tracking* represents the percent coverage of the goal based on where the assets should be.

Financial Progress Snapshot - Goal Coverage

Are You On Track?

An overview of your goals is provided below to track your progress. This report can help you determine if adjustments are needed to stay on track and achieve your goals.



Goal Description	1st Year Goal Need*	Are You On Track?	Goal Start Date	Where You Are Tracking	Where You Should Be Tracking
Retirement	\$22,014	Yes	11/1/2021	100%	100%
College Education (Mister)	\$4,000	Yes	In Progress	100%	100%
Expense (Joint)	\$10,609	Yes	1/1/2017	100%	100%
Emergency Fund	\$4,774	Yes	11/1/2015	100%	100%

* = Today's Dollars

Important: The calculations or other information generated by NaviPlan® version 13.2 regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. These calculations are shown for illustrative purposes only because they utilize return data that may not include fees or operating expenses, and are not available for investment. If included, fees and other operating expenses would materially reduce these calculations.

Prepared by Bob LobLaw, 5

Page 1 of 2