

Annotated Report Guide for ... Major Purchase Goal Progress Summary

Major Purchase Goal Progress Summary

Focusing on the basics of meeting goals, this report shows goal coverage based on current values versus where they should be tracking and the total differences between the two scenarios.

1 Assets Funding At Start of Goal

compares current values of major purchase assets versus where they should be and calculates the difference value between the two.

Difference = Where You Are Tracking as of Goal Start Date - Where You Should Be Tracking as of Goal Start Date

2 Major Purchase Goal Coverage

Lists percent of goal covered currently versus where you should be tracking.

3 Plan Overview - Where You Are Tracking

lists assumptions of the plan based on current values.

4 Plan Overview - Where You Should Be Tracking

lists assumptions of the plan based on where the current values should be to meet need.

5 How to Get Back On Track

lists options for both current plan and where the current plan should be in order to meet needs.

Major Purchase Goal Progress Summary

Expense (Joint) - Are You On Track?

You are currently tracking to where you should be to achieve this goal. There may be opportunities to adjust your goal.

1 ASSETS FUNDING AT START OF GOAL

Where You Are Tracking as of Goal Start Date:	Where You Should Be Tracking as of Goal Start Date:	Difference:
\$141,839	\$145,528	(\$3,690)

2 MAJOR PURCHASE GOAL COVERAGE

Where You Are Tracking - 100%

Where You Should Be Tracking - 100%

STRONG
 PARTIAL
 INSUFFICIENT

Plan Overview	Where You Are Tracking	Where You Should Be Tracking
Purchase Date	1/1/2017	1/1/2017
Index Rate	3.00%	0.00%
Purchase Amount (Today's \$)	\$10,609	\$10,609
Projected Purchase Amount	\$11,255	\$11,255
Rate of Return	1.94%	1.94%
Assets Funding This Goal	\$68,373	\$72,015
Assets Funding at Start of Goal	\$141,839	\$145,528
Surplus/(Shortfall) at Goal Date	\$0	\$0

How To Get Back On Track	Progress Plan	Proposed Plan
Alter Spending	\$133,673	\$133,673
Save Monthly	\$0	\$0
Save a Lump Sum	\$0	\$0
Change Purchase Date to	2015	2015

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Prepared by Bob LobLaw, 5 Page 4 of 5