

Annotated Report Guide for... Retirement Goal Progress Details

Retirement Goal Progress Details

This report offers a comparison between current assets and how they meet need versus where current assets needs to be in order to meet need.

1 **Where Are You Tracking** lists a retirement needs timeline, based on current asset values and projected cash flows, listing any deficits.

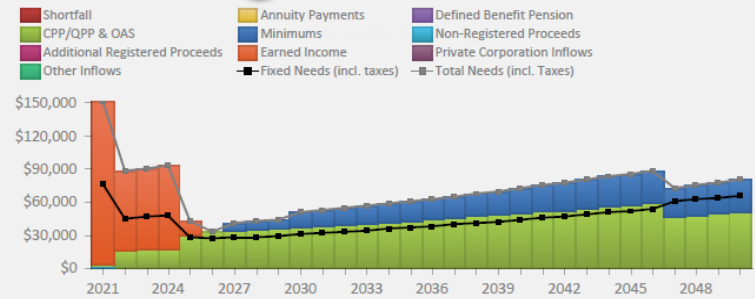
2 **Where You Should Be Tracking** lists a retirement needs timeline, based on where current assets and projected cash flows should be in order to meet needs.

Retirement Goal Progress Details

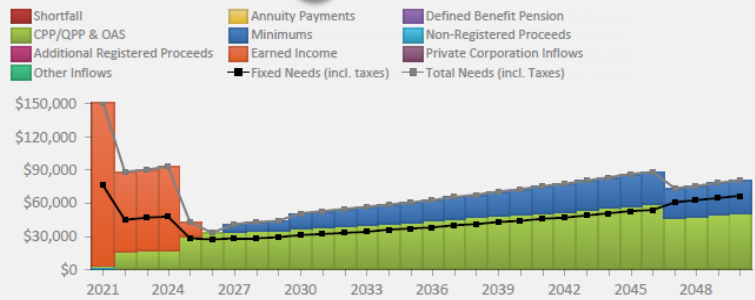
Are You On Track?

This report compares retirement needs to retirement incomes and assets. Based on what you have, you are tracking ahead to where **100%** of your retirement needs can be met. However, there may be opportunities to adjust this goal based on the recommendations previously provided.

Where You Are Tracking **1**



Where You Should Be Tracking **2**



Important: The calculations or other information generated by NaviPlan® version 15.2 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.