

Annotated Report Guide for... Retirement Goal Progress Summary

Retirement 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 Retirement

compares current values projected to goal start date for retirement 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 Retirement 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.

