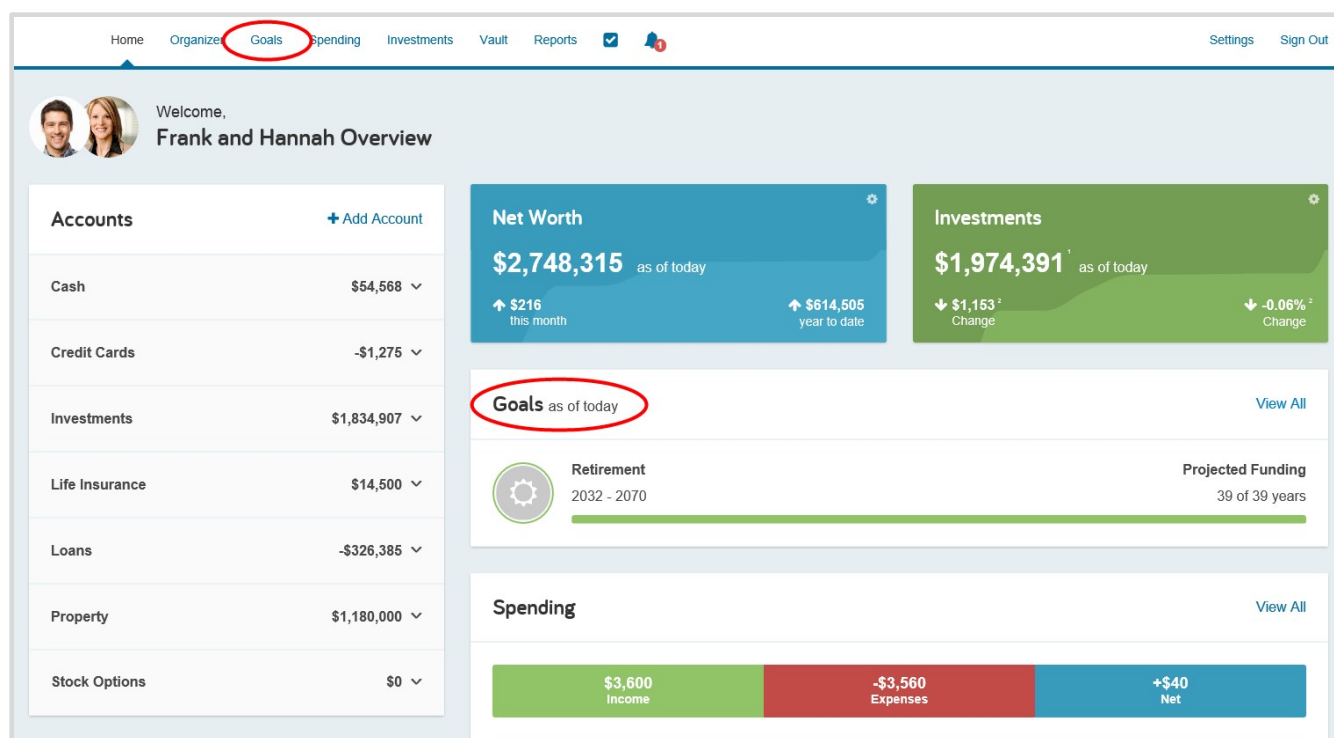


# Goals Overview

This training guide will walk you through utilizing the Goals feature available in your financial portal. The goal tracking tool allows you to analyze and monitor progress of your financial goals in real time. You can easily add, personalize, and track your financial goals – including the ability to earmark which accounts you want to use to fund your goals and visualize how funding will grow over time!

1. To access goals, click the **Goals** tab or tile from your home page.



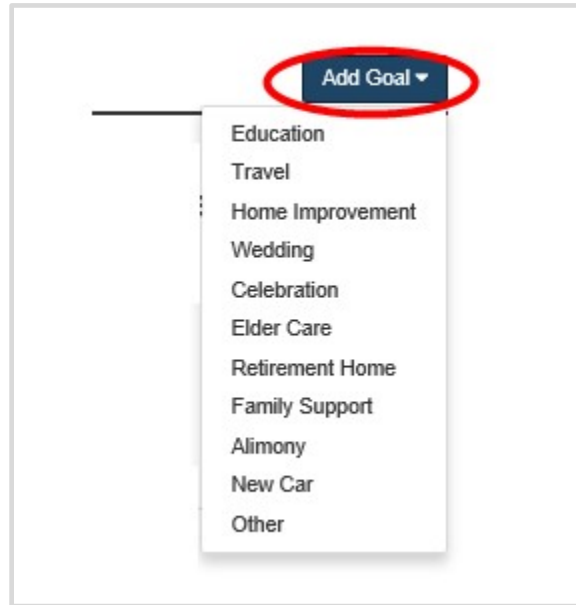
# Goals Overview

- 2. The goals page will show you all of the goals you and your advisor have entered. The chart displays your Total Portfolio Assets as you age. Click the **Details** link to review a specific goal & it's funding, or click **Add Goal** to begin adding a new goal.

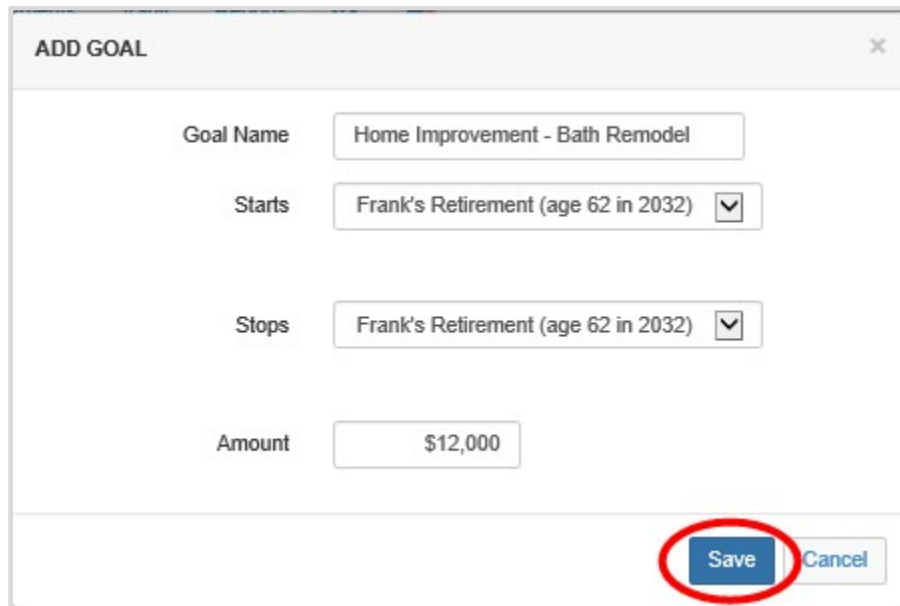


# Goals Overview

3. Select which type of Goal to add.



4. Rename the goal to something more descriptive, then choose when it occurs and how much it will cost. Click **Save**.

A screenshot of a web application showing a form titled 'ADD GOAL'. The form has four fields: 'Goal Name' with the value 'Home Improvement - Bath Remodel', 'Starts' with the value 'Frank's Retirement (age 62 in 2032)', 'Stops' with the value 'Frank's Retirement (age 62 in 2032)', and 'Amount' with the value '\$12,000'. The 'Save' button is circled in red.

# Goals Overview

5. Next you will be able to add additional details about this goal. To figure out if you are on track to fully fund this goal, you will need to add a funding source. The system will use these targeted accounts to fund the goal and provide the simulated results. Click **Add Funding Sources**.

Go back to Goals

## Home Improvement - Bath Remodel

How am I doing?

You have not added any funding sources yet. Add your funding sources to activate this section.

[+ Add Funding Sources](#)

Upload Photo

Details	Edit
Starts	2032
Stops	2032
Annual Amount	\$12,000
Total with Inflation (3.76%)	\$20,875

Funding Sources Edit

No funding sources are selected.

[Delete this goal](#)

6. A modal will appear for you to select specific accounts to fund or “pay” for this goal. Check them on or off to have them appear as funding sources for this goal.

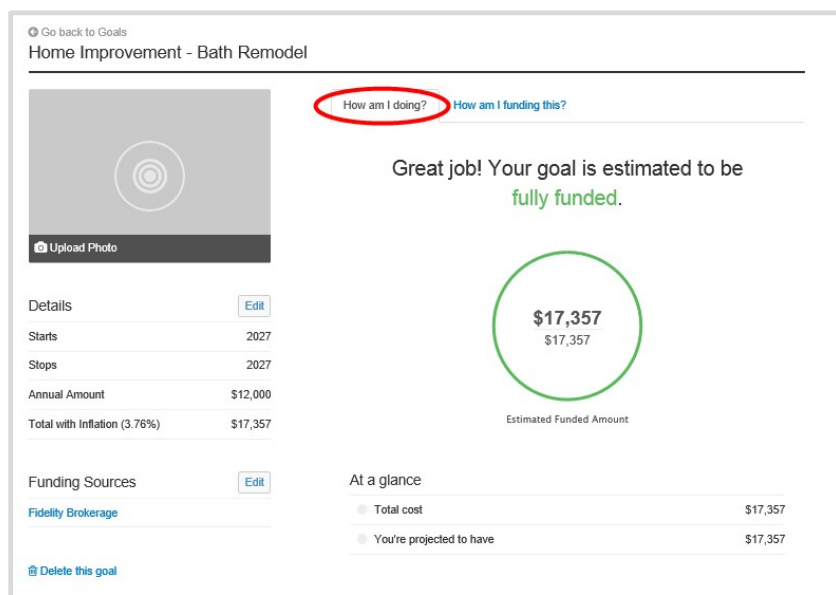
### EDIT FUNDING SOURCE

Account Name	Current Balance
<input type="checkbox"/> Annuity	\$650,000
<input type="checkbox"/> Easy 123 Checking	\$54,568
<input type="checkbox"/> Fidelity 401(k)	\$70,034
<input checked="" type="checkbox"/> Fidelity Brokerage	\$129,971
<input type="checkbox"/> Health Savings Account	\$41,385
<input type="checkbox"/> Orion Investments	\$320,249
<input type="checkbox"/> Permanent Life Insurance	\$14,500
<input type="checkbox"/> Qualified Retirement	\$250,000

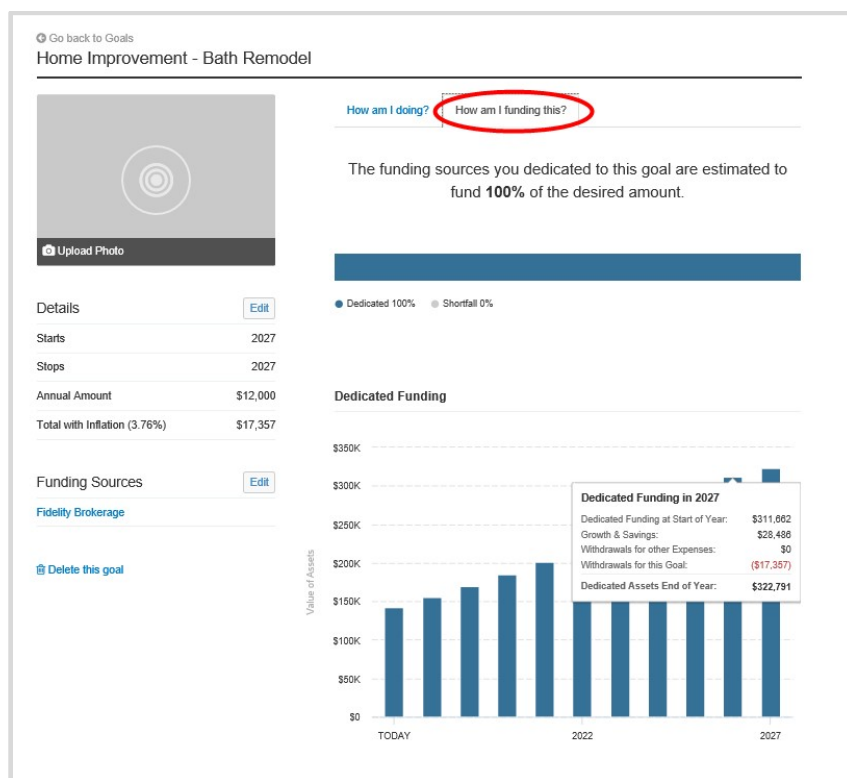
[Save](#) [Cancel](#)

# Goals Overview

7. The *How am I Doing?* tab will show you the estimated funding amount, as well as the Total projected costs and funding in the specified sources.



8. The *How am I Funding this?* tab displays any potential shortfalls. Dedicated funding will be drawn directly from the accounts you previously specified as Funding Sources. Roll your mouse over the dedicated funding chart for detailed information year by year.



# Goals Overview

9. Congratulations! You now know how to add a Goal. You can review your Goals from your Home page as well as get more detailed information & add any new goals in the Goals tab!

