

This User Guide details the Goals feature on your Client Site.

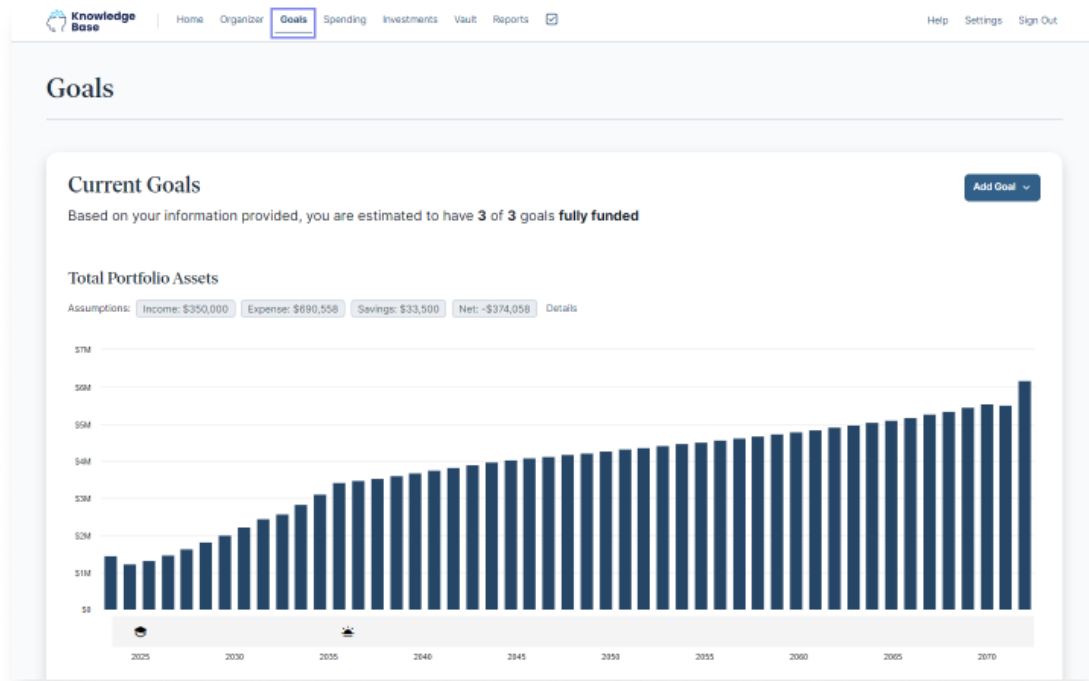
The goal-tracking tool allows you to analyze and monitor the progress of their financial goals in real-time. Add, personalize, and track financial goals and watch how the funding will grow over time!

1. The Home page of your site displays a Goals tile with a recap of the goals you and your advisor entered. To see all your Goals and their details, click the **Goals** tab or anywhere in the **My Goals** tile.

The screenshot shows the 'Goals' tab highlighted in the navigation menu. The main content area is titled 'Welcome Frank and Joanna Miller'. It features several summary cards: 'Accounts' with a list of categories and balances; 'Net Worth' at \$1,993,263 as of today, with a monthly change of \$149,707; and 'Investments' at \$2,128,351 as of today, with a year-to-date change of \$203,767. The 'My Goals' section, which is highlighted with a blue border, contains three goal cards, each with a progress bar and a 'View All' link.

Goal Name	Period	Current Status	Projected Funding
Retirement	2036 - 2072	37 of 37 years	Projected Funding
College for Mary Beth	2023 - 2026	\$412,767 of \$156,080	Projected Funding
College for Lucas	2025 - 2028	\$470,282 of \$220,816	Projected Funding

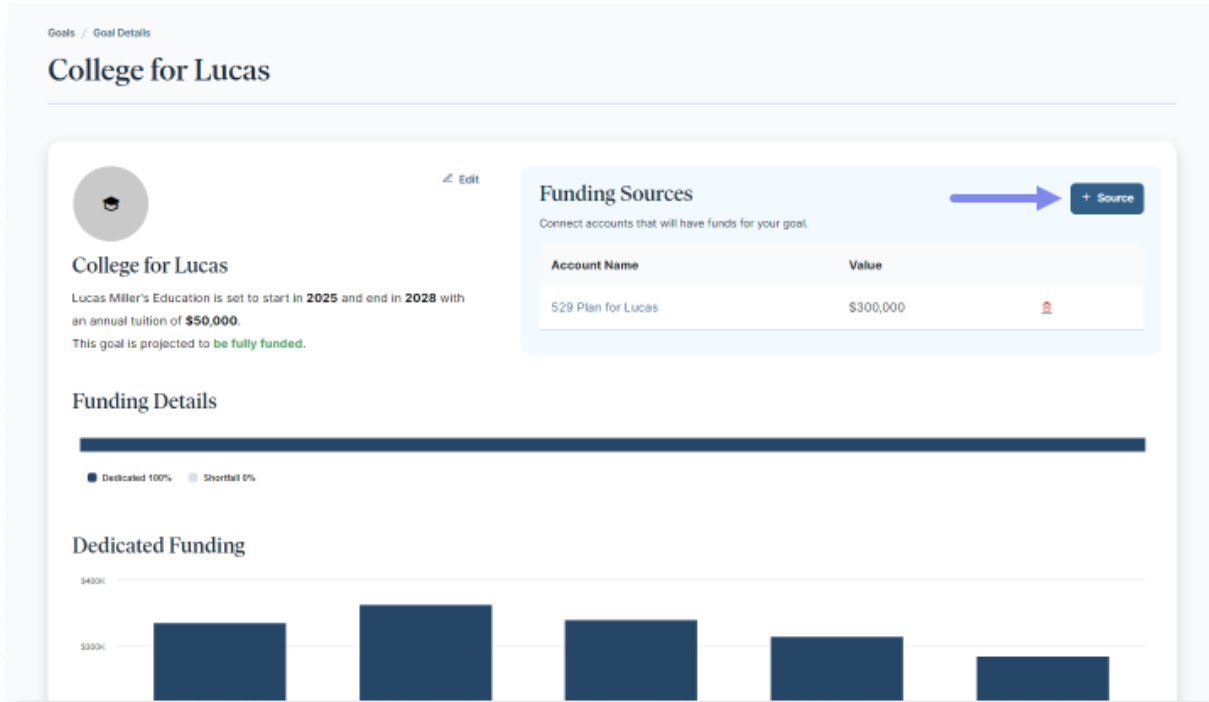
- The Goals page opens with a chart and list of your goals. The graph displays your Total Portfolio Assets as you age. The chart shown may differ depending on your Advisor's settings.



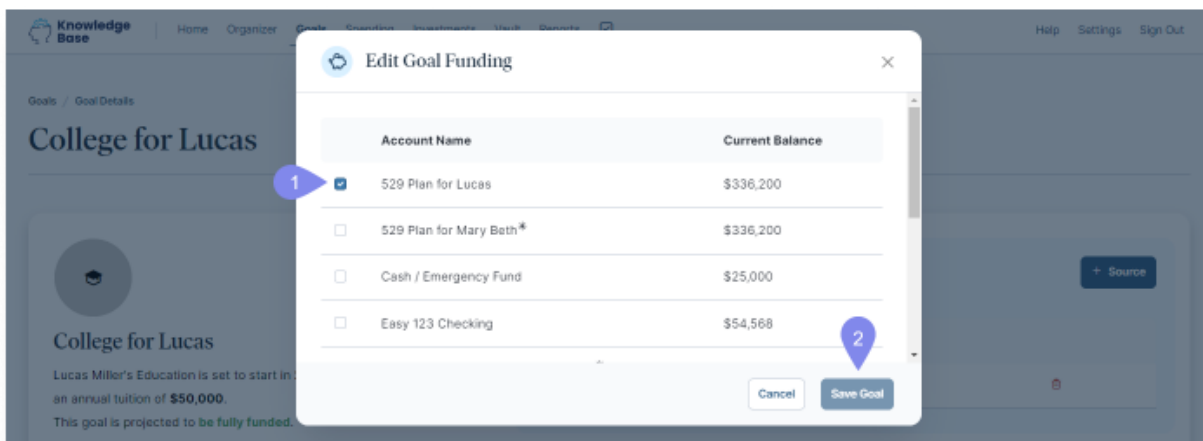
- Each Goal is displayed with details and a percentage showing the likelihood of success. Click **View Goal Details** to see more information on a specific goal.

The 'My Goals' section displays three goal cards. Each card includes a goal icon, a title, a description, and a '100% Percent Funded' status. The first goal is 'Retirement' with a person icon, stating 'Frank is set to retire at 65 and Joanna at 65 with retirement expenses of \$140,000 per year. This goal is projected to be fully funded.' The second is 'College for Lucas' with a graduation cap icon, stating 'Lucas Miller's Education is set to start in 2025 and end in 2028 with an annual tuition of \$50,000. This goal is projected to be fully funded.' The third is 'College for Mary Beth' with a graduation cap icon, stating 'Mary Beth Miller's Education is set to start in 2023 and end in 2026 with an annual tuition of \$50,000. This goal is projected to be fully funded.' Each card has 'View Goal Details' and 'Edit Goal' links.

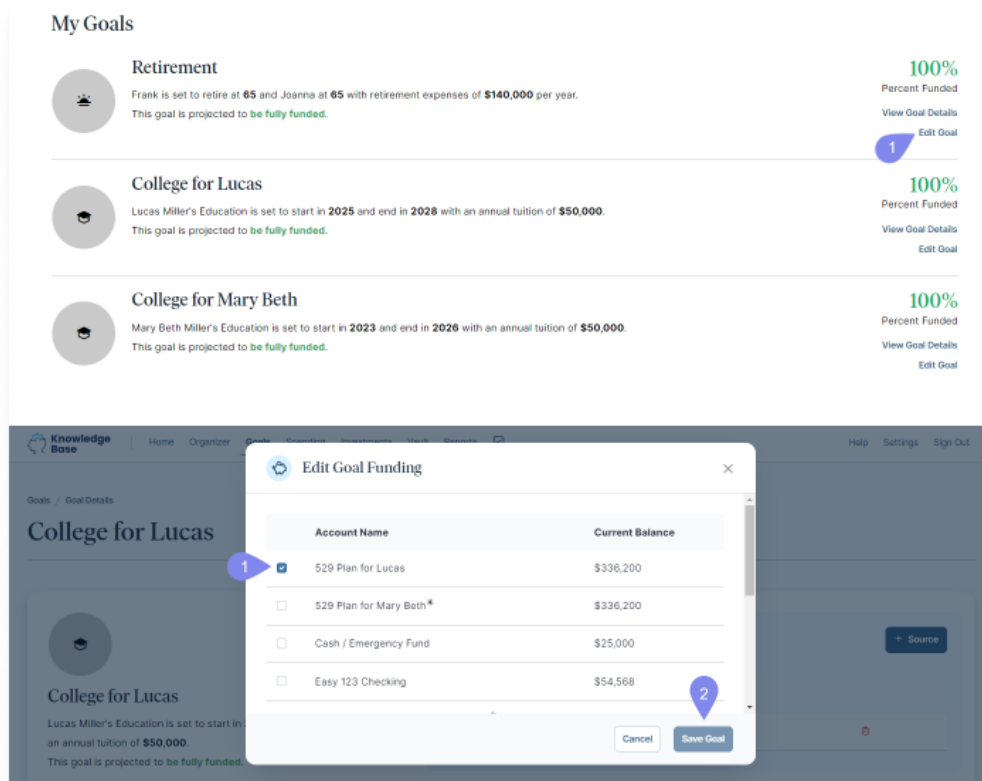
4. Within each goal you can see Funding Details and Sources. To view or edit the funding source of your goal, click the **+ Source** button on the right side of the screen.



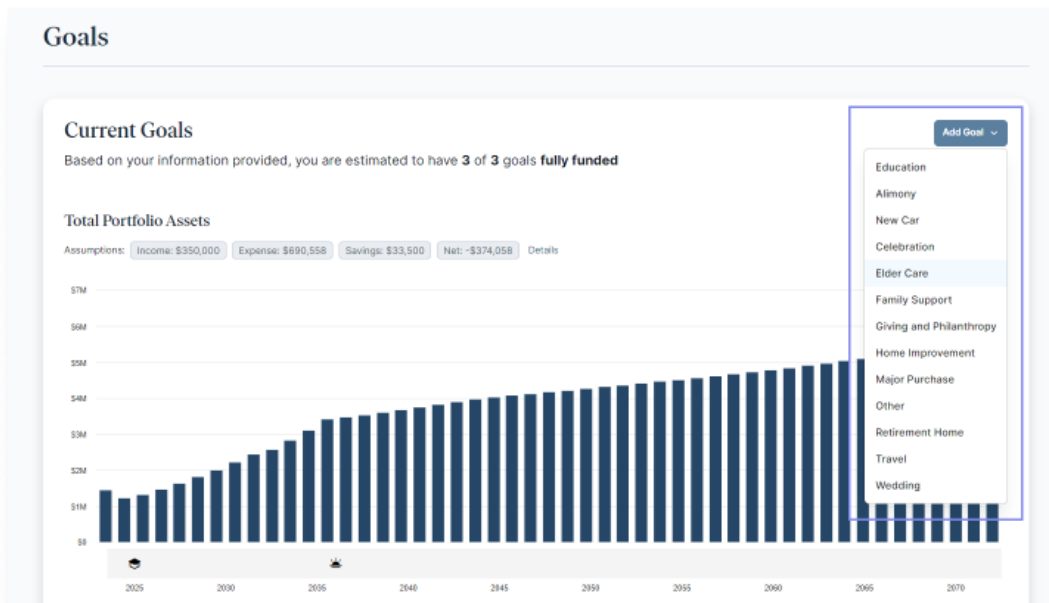
5. Use the check boxes on the left to select what accounts you want to fund your goal with. Then click **Save Goal**.



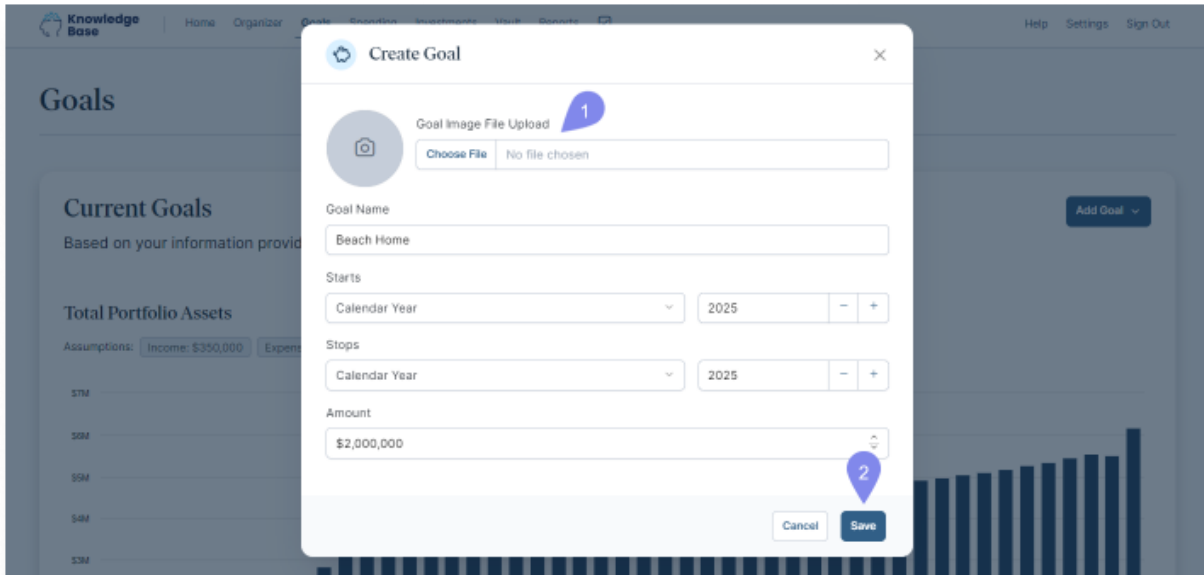
6. Click **Edit Goal** to change the current funding sources at any point. Remember to then **Save Goal**.



7. To create a new Goal, click **Add Goal**, choose a template from the list, or select **Other**.



8. Name your Goal and input the Goal details here. Note that the Goal Amount should always be annual. This will create an expense for the Amount in cash flow for every year the goal occurs, including the start and stop years. Click **Save**.



9. The Add Goal Funding window will pop up after you click Save when creating your Goal. Check the boxes on the Accounts you want to fund your Goal with. Then click **Save Goal**.

