

# 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.

The screenshot displays a financial dashboard with the following components:

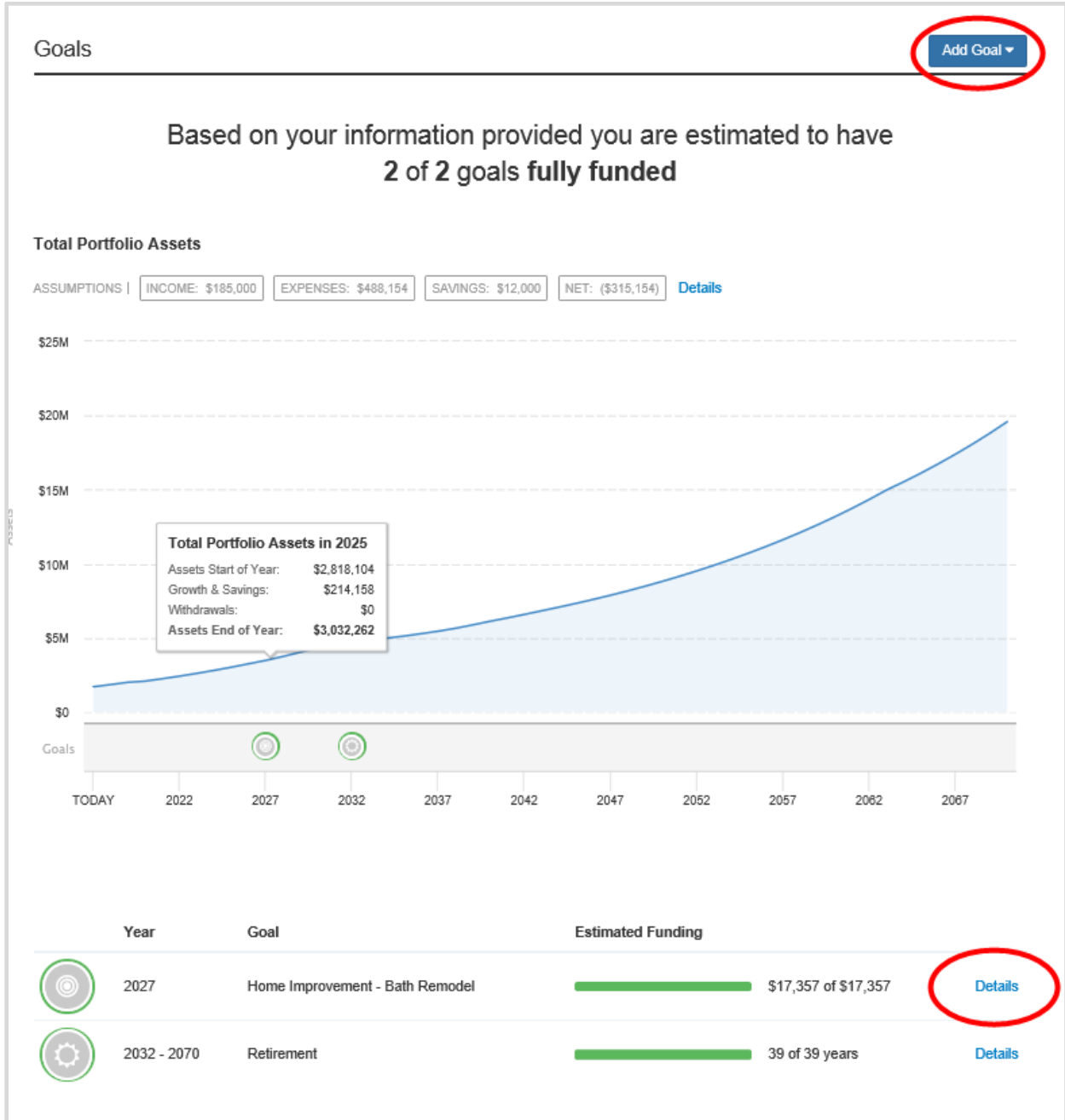
- Navigation Bar:** Home, Organize, **Goals** (circled in red), Spending, Investments, Vault, Reports, Settings, Sign Out.
- User Greeting:** Welcome, Frank and Hannah Overview.
- Accounts Table:**

Accounts	+ Add Account
Cash	\$54,568
Credit Cards	-\$1,275
Investments	\$1,834,907
Life Insurance	\$14,500
Loans	-\$326,385
Property	\$1,180,000
Stock Options	\$0
- Net Worth:** \$2,748,315 as of today. Changes: +\$216 this month, +\$614,505 year to date.
- Investments:** \$1,974,391 as of today. Changes: -\$1,153 Change, -0.06% Change.
- Goals as of today:** (Circled in red) View All
- Retirement:** 2032 - 2070. Projected Funding: 39 of 39 years.
- Spending:** View All
 

\$3,600 Income	-\$3,560 Expenses	+\$40 Net
----------------	-------------------	-----------

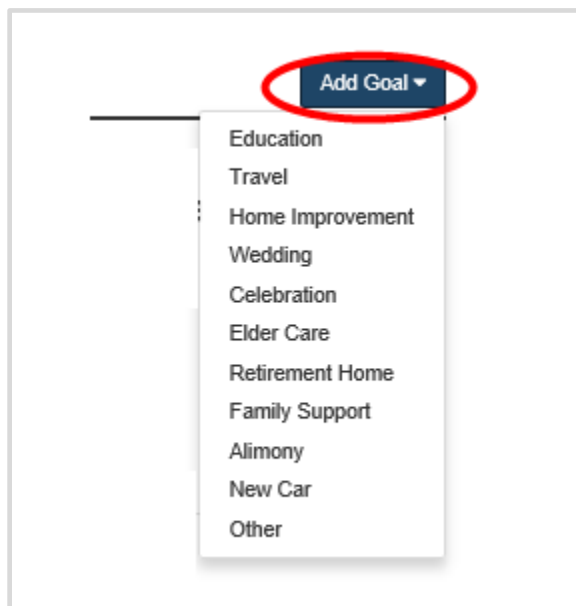
# Goals Overview

- 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**.

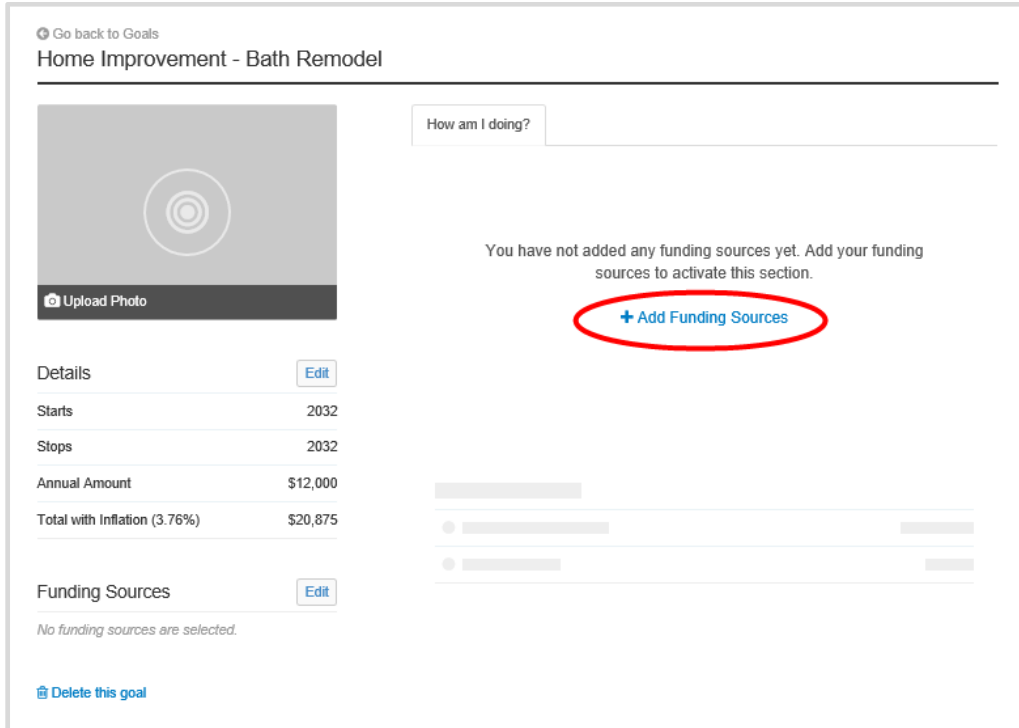
A screenshot of a form titled 'ADD GOAL' with a close button (X) in the top right corner. The form contains the following fields:

- Goal Name: Home Improvement - Bath Remodel
- Starts: Frank's Retirement (age 62 in 2032) [dropdown arrow]
- Stops: Frank's Retirement (age 62 in 2032) [dropdown arrow]
- Amount: \$12,000

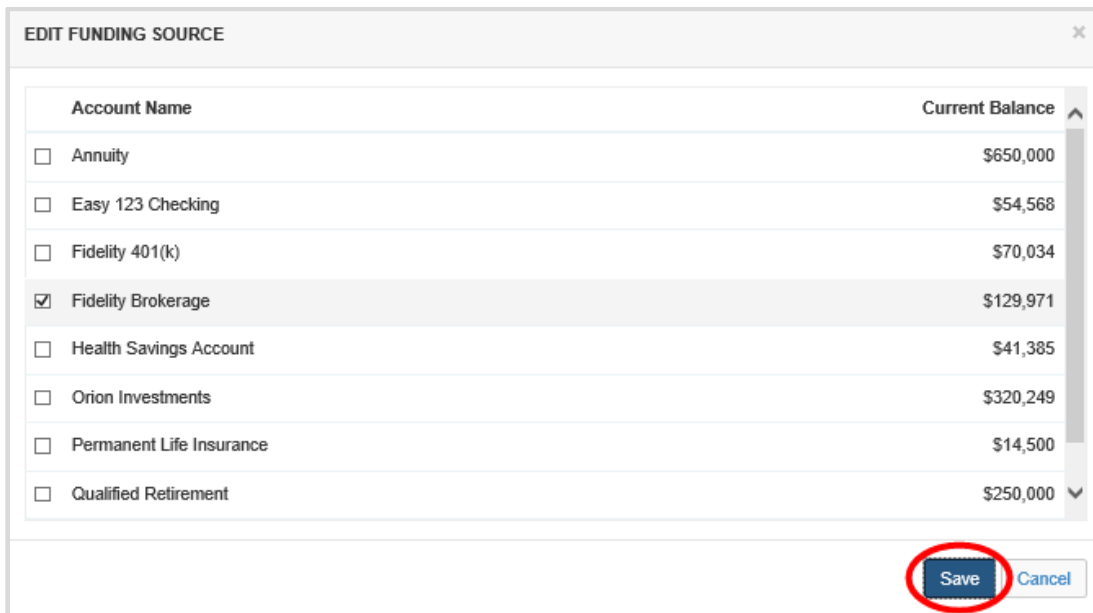
At the bottom right of the form, there are two buttons: 'Save' (circled in red) and 'Cancel'.

# Goals Overview

- 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**.

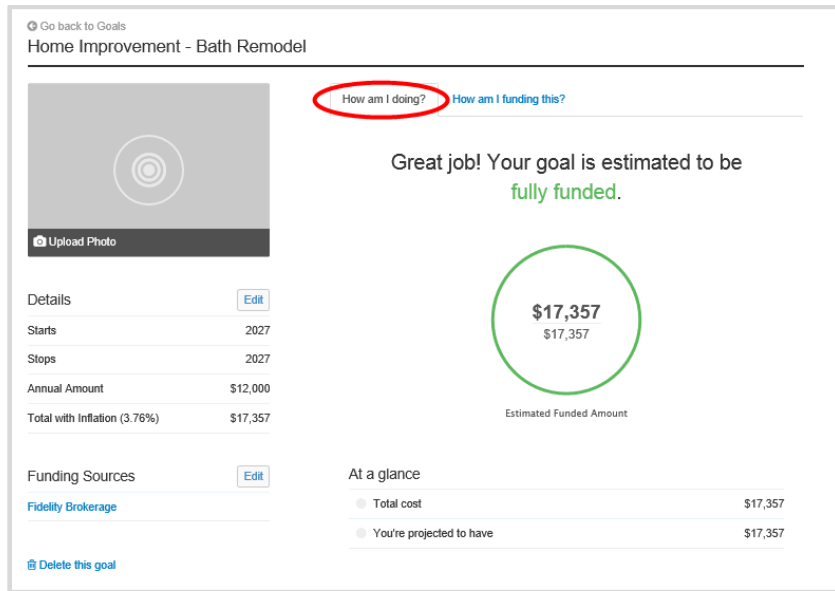


- A modal will appear for you to select specific accounts to fund or “pay” for this goal. Check them on or off to have them appear as funding sources for this goal.

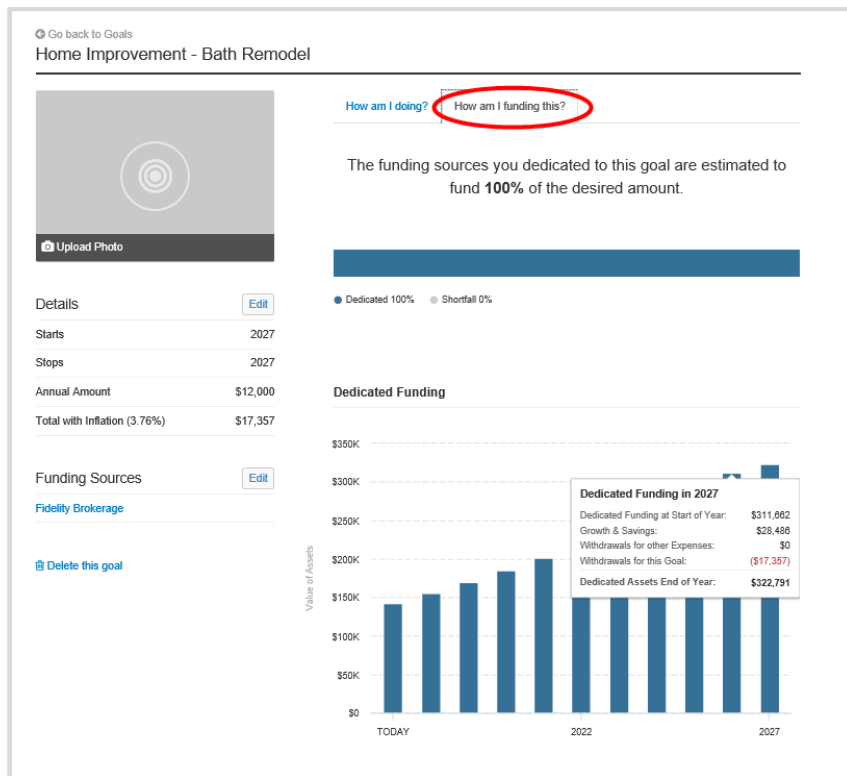


# Goals Overview

- 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.



- 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!

The screenshot displays a personal financial website interface. At the top, a navigation menu includes Home, Organizer, Goals, Spending, Investments, Vault, Reports, and a notification bell. A user profile section on the left shows a welcome message for Frank and Hannah. The main dashboard features several key metrics:

- Accounts:** A list of financial accounts including Cash (\$54,568), Credit Cards (-\$1,275), Investments (\$1,834,907), Life Insurance (\$14,500), Loans (-\$326,385), and Property (\$1,180,000).
- Net Worth:** \$2,748,315 as of today, with a monthly increase of \$216 and a year-to-date increase of \$614,505.
- Investments:** \$1,974,391 as of today, with a change of -\$1,153 and a percentage change of -0.06%.
- Goals:** A section titled "Goals as of today" (circled in red) listing two goals:
  - Retirement:** 2032 - 2070, with a progress bar and "Projected Funding 39 of 39 years".
  - Home Improvement - Bath Remodel:** 2027, with a progress bar and "Projected Funding \$17,357 of \$17,357".