

# Goals

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.

Home Organize **Goals** Spending Investments Vault Reports Settings Sign Out

Welcome, Frank and Hannah Overview

**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  
↑ \$216 this month    ↑ \$614,505 year to date

**Investments** \$1,974,391<sup>1</sup> as of today  
↓ \$1,153<sup>2</sup> Change    ↓ -0.06%<sup>2</sup> Change

**Goals** as of today [View All](#)

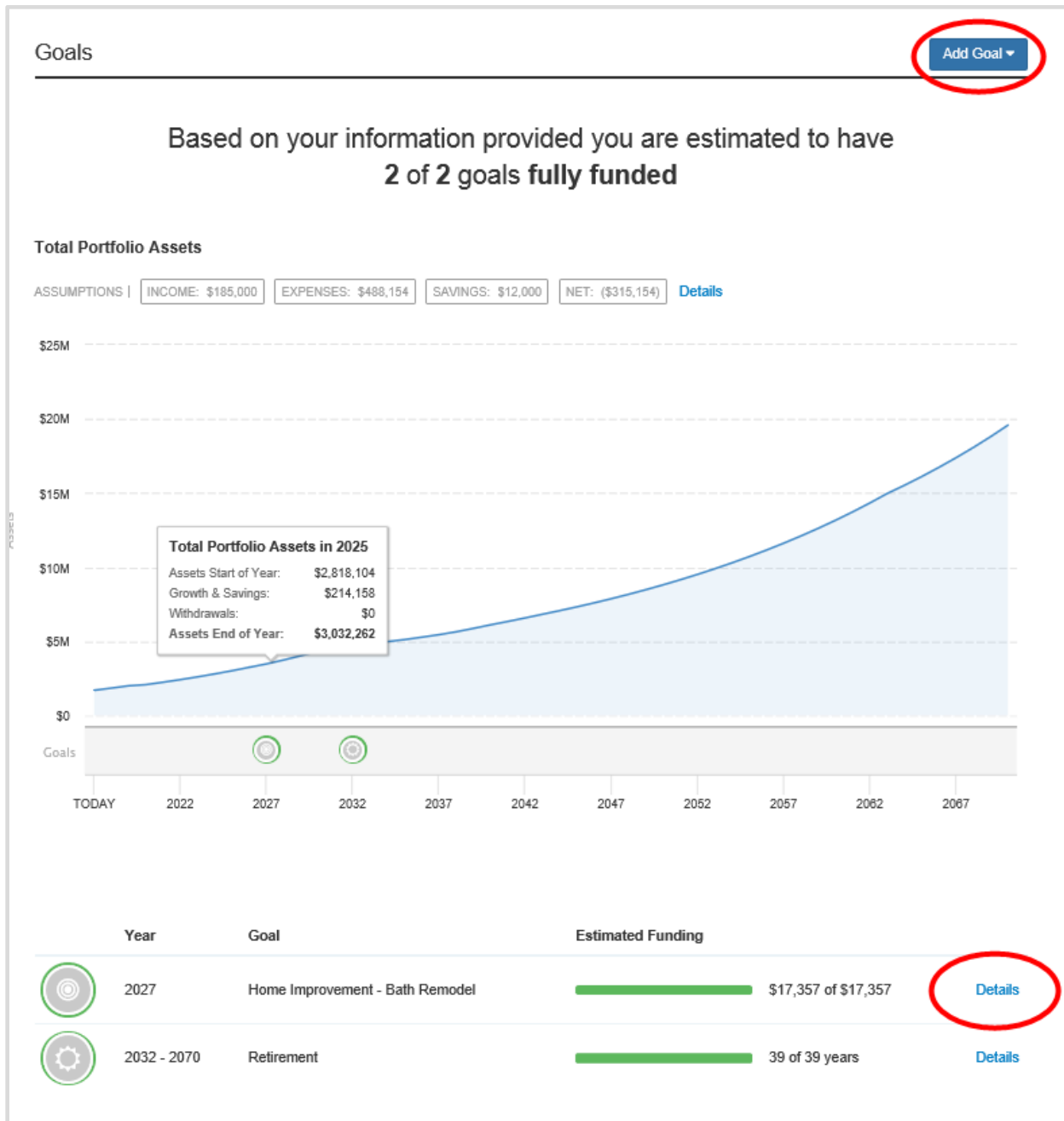
**Retirement** 2032 - 2070 **Projected Funding** 39 of 39 years

**Spending** [View All](#)

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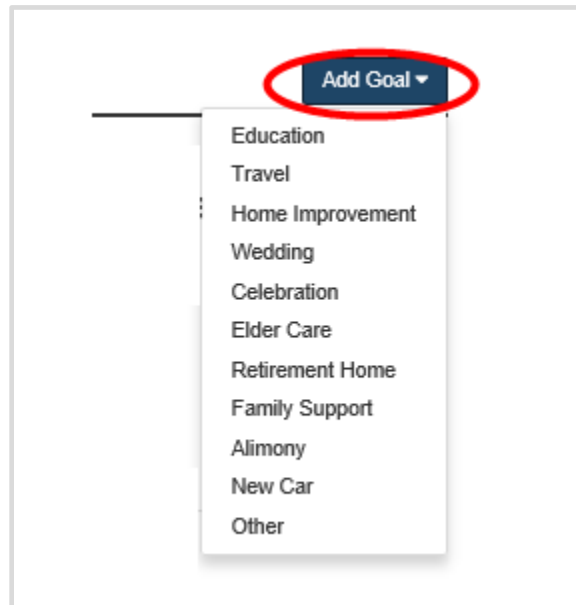
# Goals

- 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 & its funding, or click **Add Goal** to begin adding a new goal.

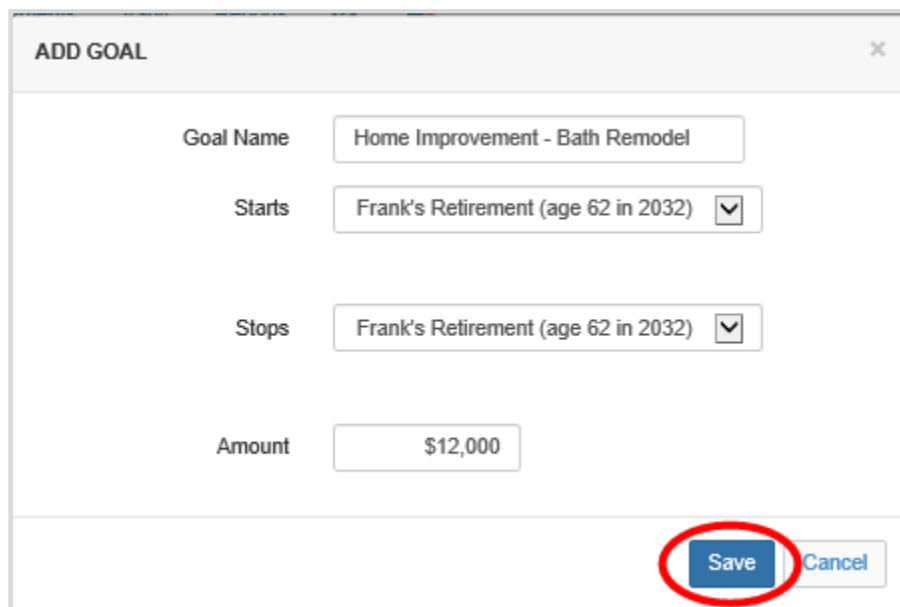


# Goals

3. Select which type of Goal to add.

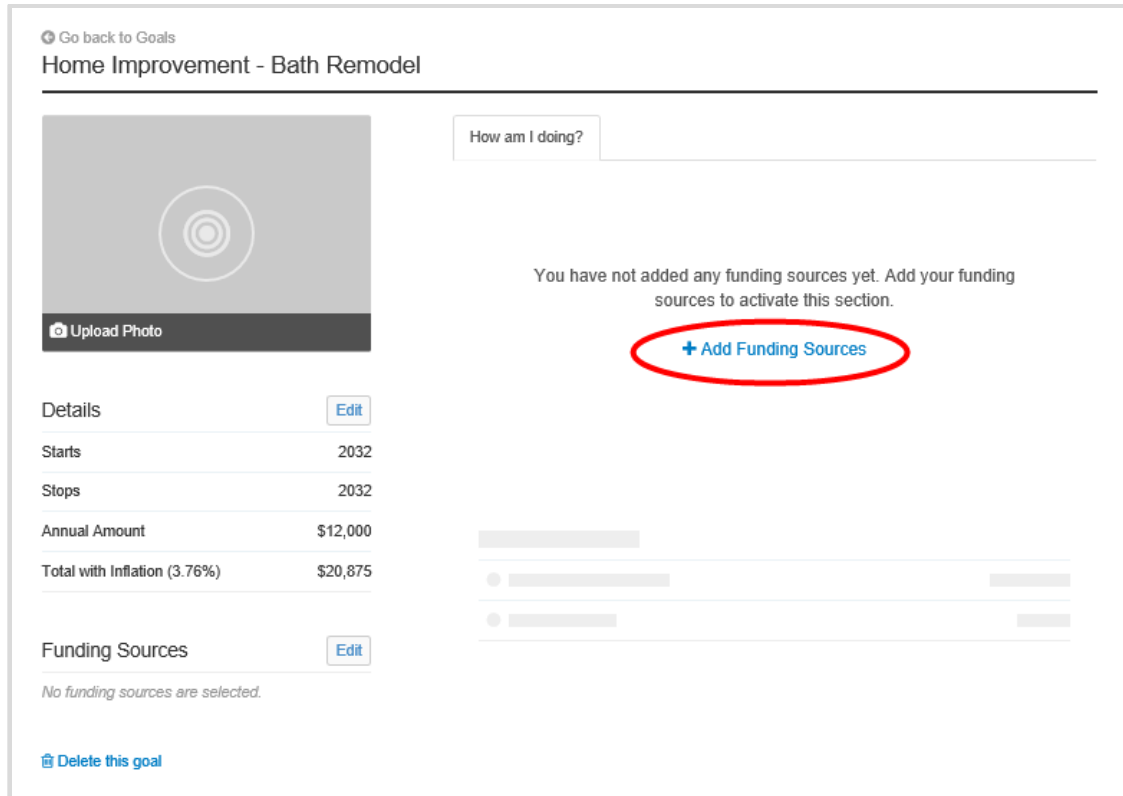


4. Rename the goal to something more descriptive, then choose when it occurs and how much it will cost. Click **Save**.

A screenshot of a form titled "ADD GOAL" with a close button (X) in the top right corner. The form contains four input fields: "Goal Name" with the text "Home Improvement - Bath Remodel", "Starts" with a dropdown menu showing "Frank's Retirement (age 62 in 2032)", "Stops" with a dropdown menu showing "Frank's Retirement (age 62 in 2032)", and "Amount" with the text "\$12,000". At the bottom right of the form, there are two buttons: "Save" (circled in red) and "Cancel".

# Goals

- 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.

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](#)

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.

Go back to Goals

## Home Improvement - Bath Remodel

[How am I doing?](#) [How am I funding this?](#)

Great job! Your goal is estimated to be **fully funded.**

**\$17,357**  
\$17,357  
Estimated Funded Amount

Details	Edit
Starts	2027
Stops	2027
Annual Amount	\$12,000
Total with Inflation (3.76%)	\$17,357

Funding Sources [Edit](#)

[Fidelity Brokerage](#)

[Delete this goal](#)

At a glance

Total cost	\$17,357
You're projected to have	\$17,357

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

Go back to Goals  
Home Improvement - Bath Remodel

How am I doing? **How am I funding this?**

The funding sources you dedicated to this goal are estimated to fund **100%** of the desired amount.

Upload Photo

Details [Edit](#)

Starts 2027  
Stops 2027  
Annual Amount \$12,000  
Total with Inflation (3.76%) \$17,357

Funding Sources [Edit](#)

Fidelity Brokerage

[Delete this goal](#)

Dedicated Funding

Value of Assets

Legend: Dedicated 100% (blue), Shortfall 0% (grey)

Dedicated Funding in 2027

Dedicated Funding at Start of Year:	\$311,002
Growth & Savings:	\$28,486
Withdrawals for other Expenses:	\$0
Withdrawals for this Goal:	(\$17,357)
Dedicated Assets End of Year:	\$322,791

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!

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	Retirement 2032 - 2070	Projected Funding 39 of 39 years
	Home Improvement - Bath Remodel 2027	Projected Funding \$17,357 of \$17,357

