Goals Tab – Explore Mode

Use Explore Mode on the Goals tab to test the impact of changes to your goals without altering the assumptions in your financial plan.

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			Current Goals Explore Mode		
	Explore Mode Active Try out potential change	es to your goals in Explore Mode. To implement any char	nges, please contact your financial advisor.		×
		There is	s a 25% chance you will meet yo	our goals.	
			Learn More		
lio Assets	tfolio Assets ONS INCOME: \$15,00 \$7M	0 EXPENSE: \$246,651 SAVINGS: \$0 NET: -\$231,651	1 Details		
	\$6M				
	\$5M				
	\$4M \$3M		2044 Above Average Market (507 Below Average Market (507	a: \$1,760,316 dm	
	\$2M				
	\$1M				
	\$0				
	Charles's Retireme				
	Katherine's Retiren	21 Education 2026 2031	Adam's College	2041 2046 2051	
			Years		

- When you first enter Explore Mode, your goal information will match the information displayed in your Current Goals.
- Hover your mouse over the chart displayed to view details about an area of the chart. The chart displayed may differ from the one shown above depending on your Advisor's settings.
- Use the Add Goal drop-down to enter new goals.
- Use the **How am I funding this?** and **Edit Retirement Goal** links to make changes to current funding, goal amounts, and other details related to your goals.
- Use the Reset button at the top right to remove any of your changes.
- If you want to make permanent changes to your goals based on the changes you make in Explore Mode, contact your financial advisor.

