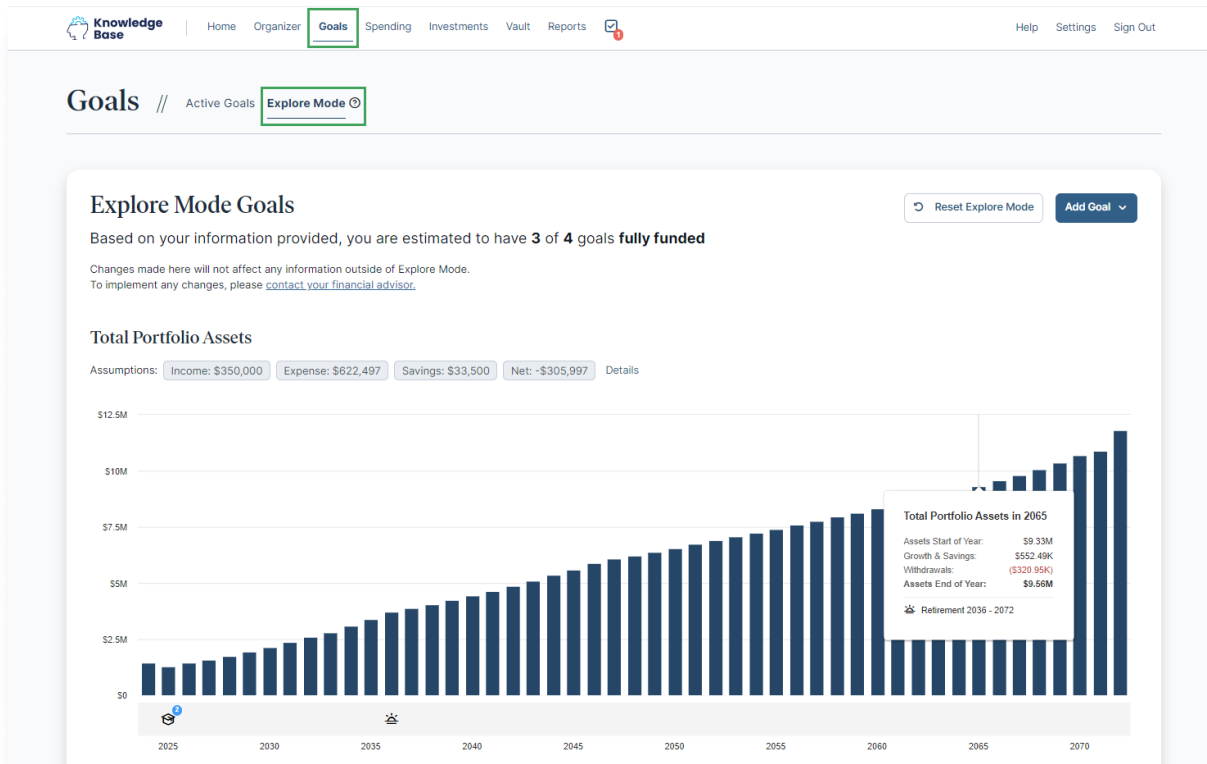


This user guide details how to use Explore Mode on the Goals tab to test the impact of changes to your goals without altering the assumptions in your financial plan.



- 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 **Reset Explore Mode** 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

My Goals

Retirement **100%**
Percent Funded

Frank is set to retire at **65** and Joanna at **65** with retirement expenses of **\$73,440** per year.
This goal is projected to be **fully funded**.

[View Goal Details](#)
[Edit Goal](#)

College for Mary Beth **100%**
Percent Funded

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**.

[View Goal Details](#)
[Edit Goal](#)