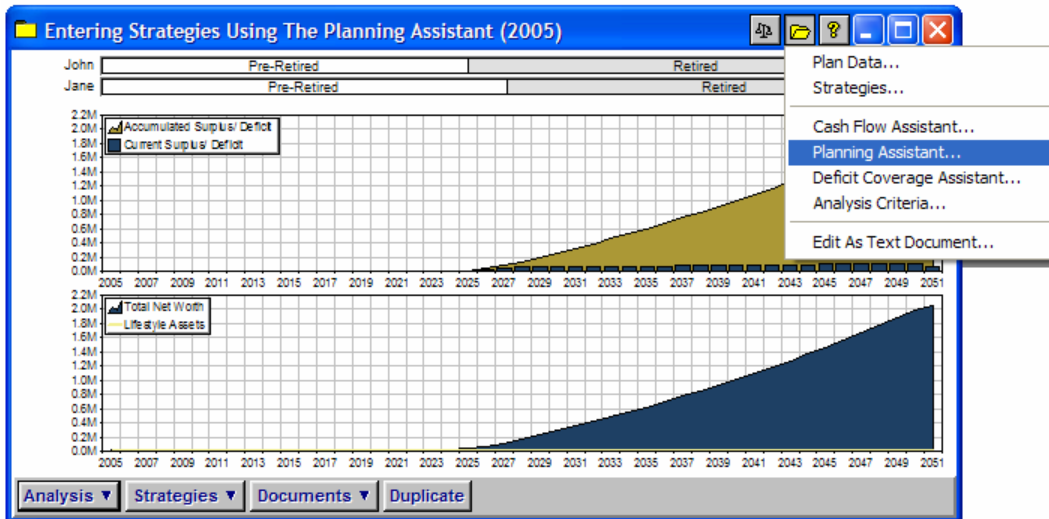


Entering strategies through the Planning Assistant

NaviPlan Extended provides a quick and easy way to enter new strategies using the *Planning Assistant* feature. To use the *Planning Assistant*, click the file folder button at the top right of the plan window, and then select **Planning Assistant** from the menu.



The *Planning Assistant* contains a row of shortcut buttons across the top. Click any one of these buttons to display additional options. In our example below, we have clicked the *Savings* shortcut button, and then the *Surplus Cash* button.

Analysis Details:

Accumulated Cash Flow **Surpluses** were detected in the following years:

Year	Current Surplus/Deficit	Accumulated Surplus	Unused RRSP Room
<			
>			

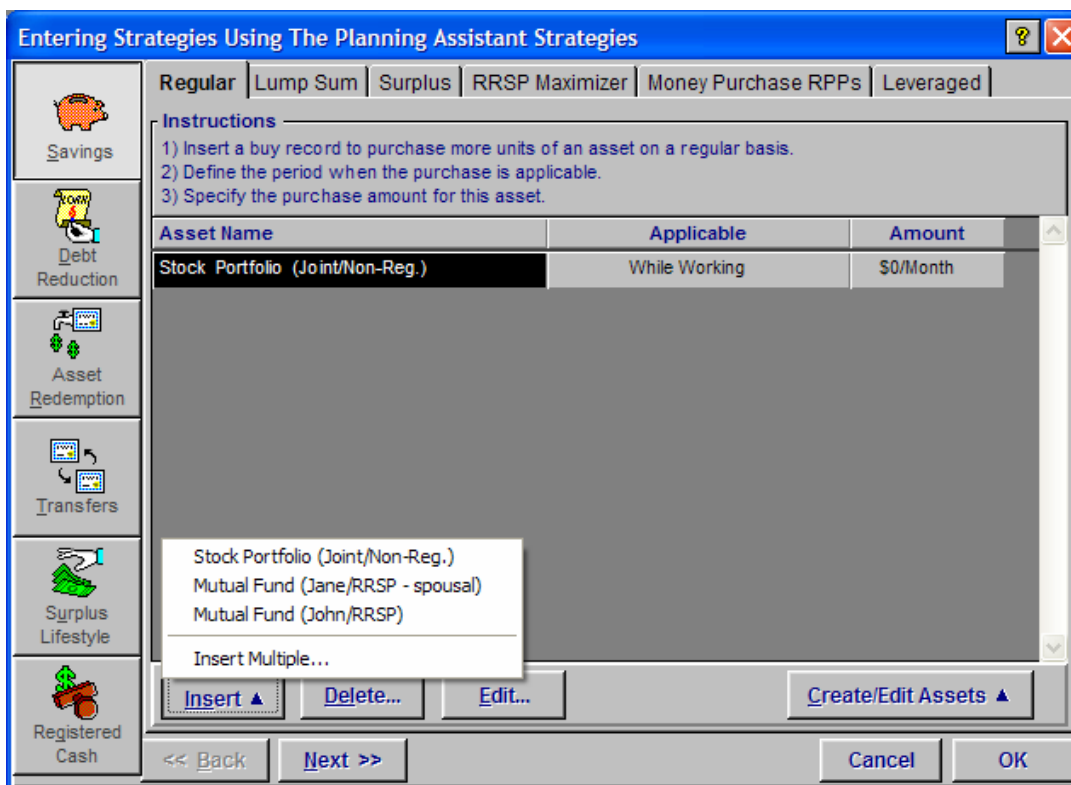
Recommendation Details:

According to the analysis of your situation the following options should be considered:

- 1) You can use the **Regular Savings Strategy** to setup a regular savings plan that will invest all or part of these surpluses into one or more investments. You can also use the **Surplus Savings Strategy** which will automatically invest surplus cash

Buttons: Regular Savings..., Surplus Savings..., Standard Expenses...

To enter a savings strategy from the *Planning Assistant*, use the buttons along the bottom of the *Savings* tab, such as the *Regular Savings* button, to open a *Strategies* dialog box. Once this dialog box is open, entering a strategy is done the same way whether you are entering it through the *Planning Assistant* or from the *Strategies* menu. However, going directly from the *Planning Assistant* allows you to spend more time planning and less time going from the *Planning Assistant* to the data entry dialog boxes.



When you are done entering your strategy data, click **OK** to return to the *Planning Assistant*. To verify the effects of each newly created strategy, select the *Graphs* option, and then view the results.

