

## Executive Summary report

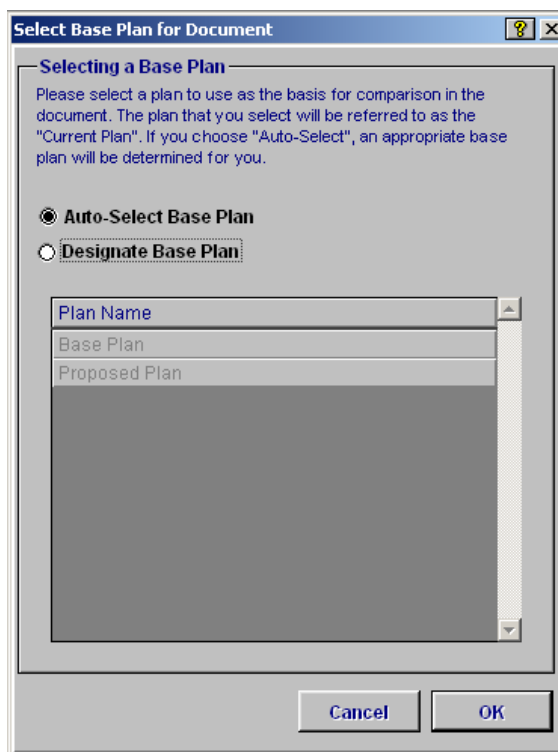
When you create financial strategies for your plans, it is helpful to review all goals to see what progress has been made toward achieving them. The *Executive Summary* report lets you do this.

### Procedure

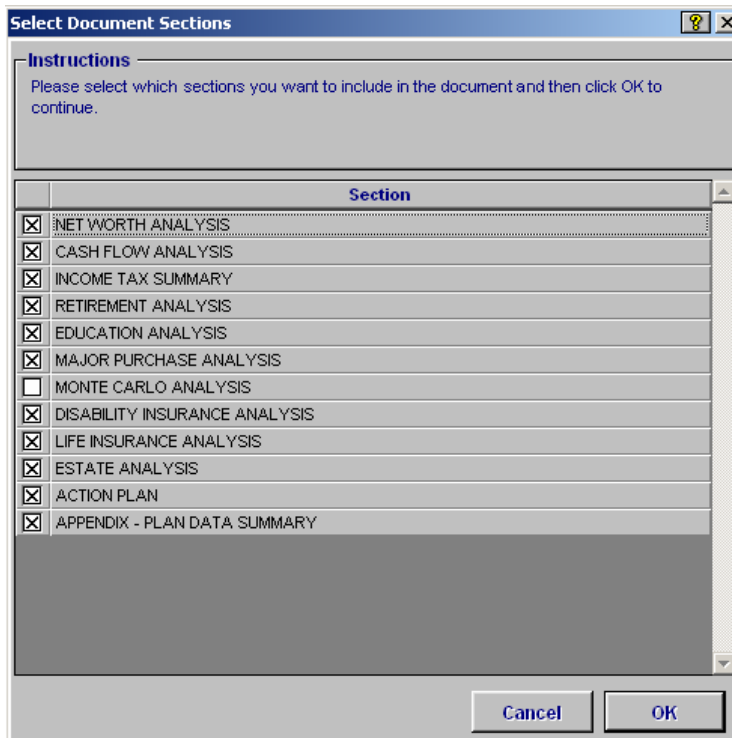
1. To create an *Executive Summary* report, drag-and-drop the **Proposed Plan** icon onto the **Generate Executive Summary** icon on your desktop, or right-click the **Proposed Plan** folder, and then select **Executive Summary**.



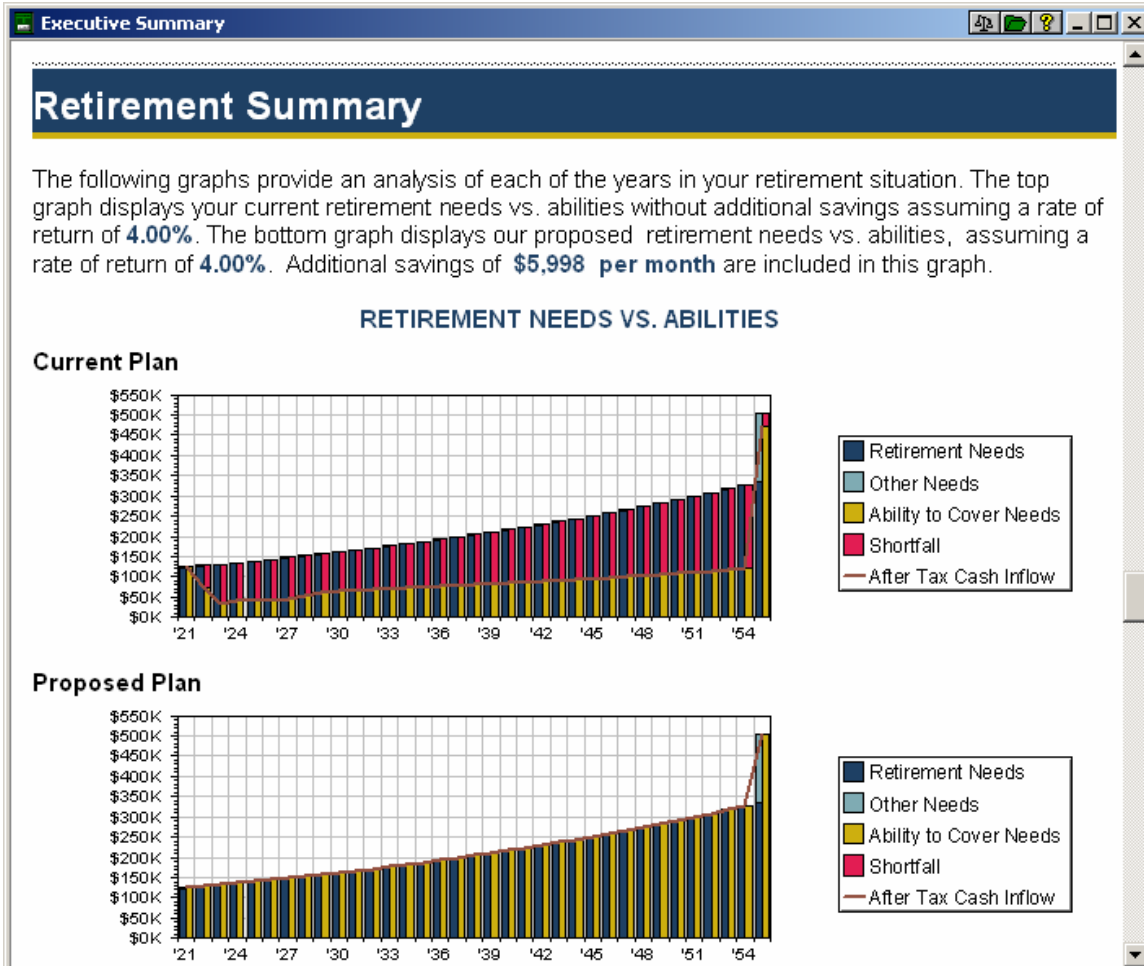
2. The *Select Base Plan for Document* dialog box appears. Select **Designate Base Plan** if your plan is to be shown as the *Current Plan*, or select **Auto-Select Base Plan** to have NaviPlan select the base plan for you. Click **OK**.



3. You are prompted to choose the sections of the report you would like to include. The *Select Document Sections* dialog box lists all the goals you have defined in your plan. In the illustration below, the goals identified in the plan upon which this report is based includes a retirement goal and an education goal. Make your selections, and then click **OK**.



The report will compare the *Current Plan* and your *Proposed Plan* and display differences in the two plans.



You can use the *Executive Summary* report to briefly illustrate to your clients where their current plan may be falling short.

When the clients are interested in seeing more detail about your recommendations, you can follow this presentation with an overview of the detailed *Client Report*. To produce the *Client Report*, drag-and-drop the **Proposed Plan** icon onto the **Generate Report** icon on the NaviPlan Standard desktop.