

## The Overview tab in the *Planning Assistant* category

Did you know that you can generate a comprehensive analysis of your clients' plan on the *Planning Assistant* category – *Overview* tab?

This assistant projects the plan into the future and extracting relevant details organized into the following categories:

- **Problems** – any possible problems you should be aware of, such as overcontributions to an RRSP
- **Questions** – any questionable strategies or data, such as assets not linked to any goals
- **Opportunities:** any investment possibilities, such as cash flow surpluses or unused contribution room.
- **Observations:** general observations and points of interest, such as residual funds in specific years as a result of overestimating savings.

