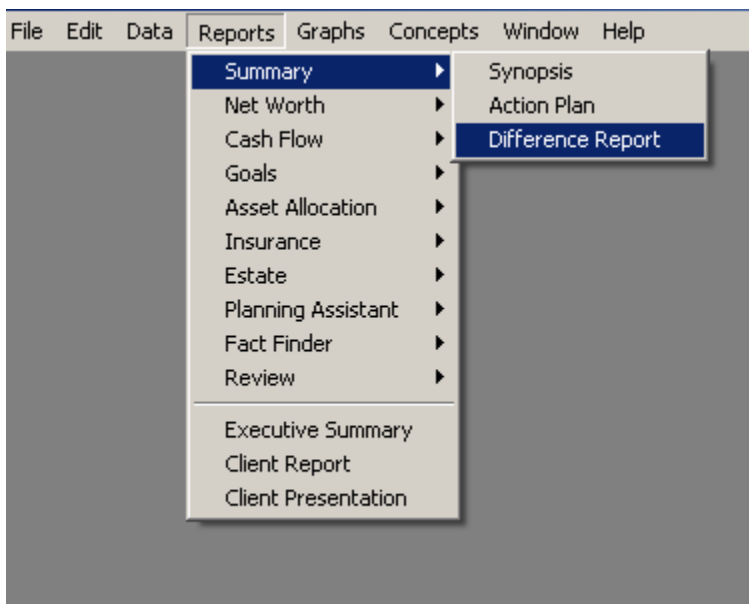


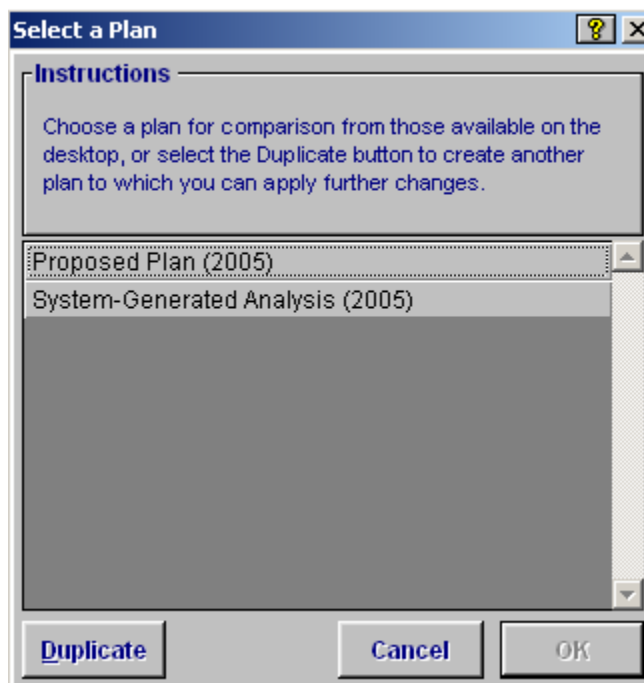
Tracking the difference between plans

The *Difference Report* is a diagnostic tool that lets you verify changes made from one plan to another.

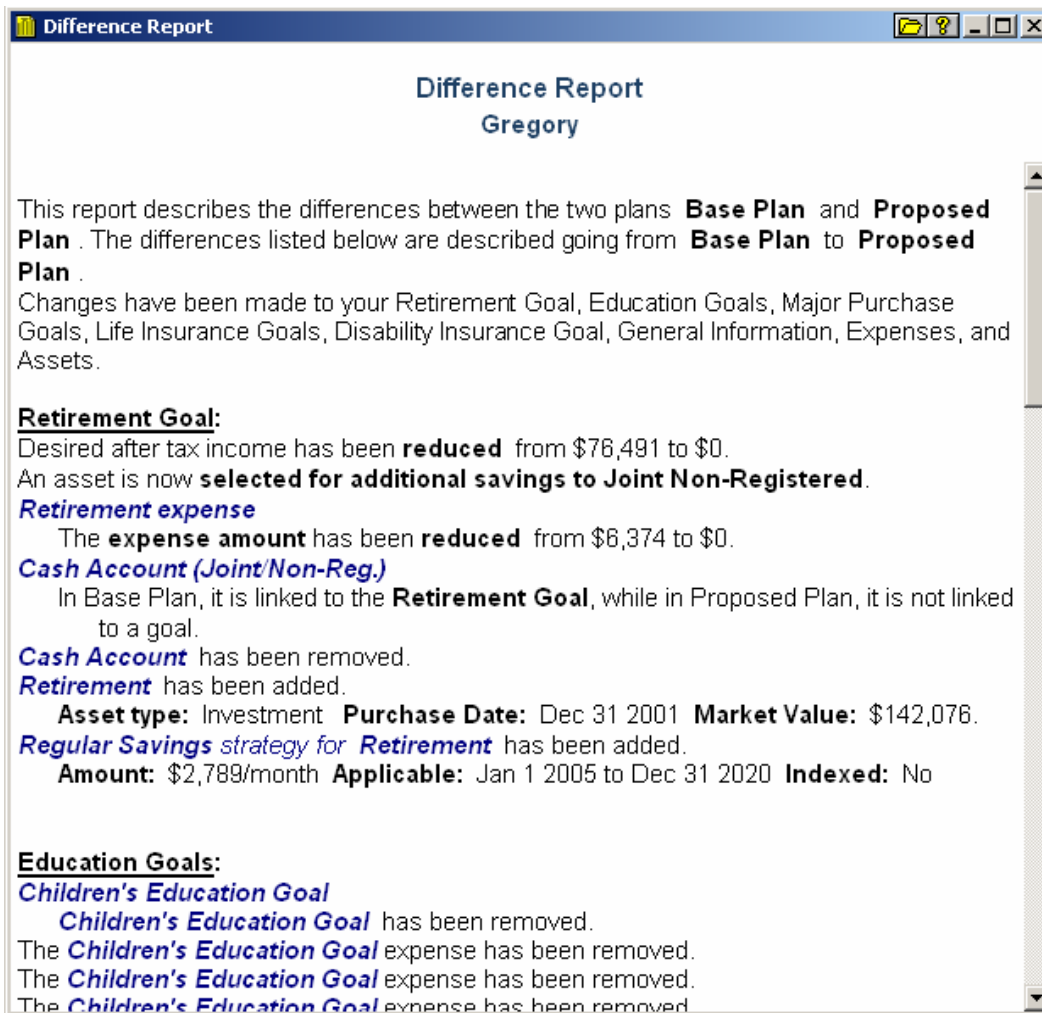
1. Go to the **Reports** menu, and then select **Summary – Difference Report**.



2. The *Select a Plan* dialog box opens. Choose a plan to compare with the active plan.



This report lists many of the major differences between two plans.



Difference Report
Gregory

This report describes the differences between the two plans **Base Plan** and **Proposed Plan**. The differences listed below are described going from **Base Plan** to **Proposed Plan**.

Changes have been made to your Retirement Goal, Education Goals, Major Purchase Goals, Life Insurance Goals, Disability Insurance Goal, General Information, Expenses, and Assets.

Retirement Goal:
Desired after tax income has been **reduced** from \$76,491 to \$0.
An asset is now **selected for additional savings to Joint Non-Registered**.

Retirement expense
The **expense amount** has been **reduced** from \$6,374 to \$0.

Cash Account (Joint/Non-Reg.)
In Base Plan, it is linked to the **Retirement Goal**, while in Proposed Plan, it is not linked to a goal.
Cash Account has been removed.
Retirement has been added.
Asset type: Investment **Purchase Date:** Dec 31 2001 **Market Value:** \$142,076.
Regular Savings strategy for Retirement has been added.
Amount: \$2,789/month **Applicable:** Jan 1 2005 to Dec 31 2020 **Indexed:** No

Education Goals:
Children's Education Goal
Children's Education Goal has been removed.
The **Children's Education Goal** expense has been removed.
The **Children's Education Goal** expense has been removed.
The **Children's Education Goal** expense has been removed.