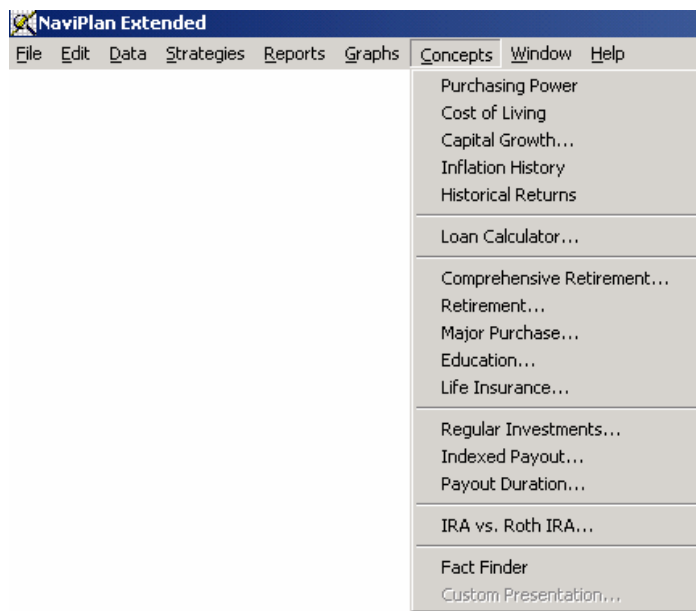


Duplicating and renaming concepts

You have always been able to duplicate NaviPlan concepts, but now you can rename the duplicated concept to differentiate it from the original.

1. Go to the **Concepts** menu, and then select the NaviPlan concept you want to create.



2. The concept's dialog opens. Enter the appropriate data.

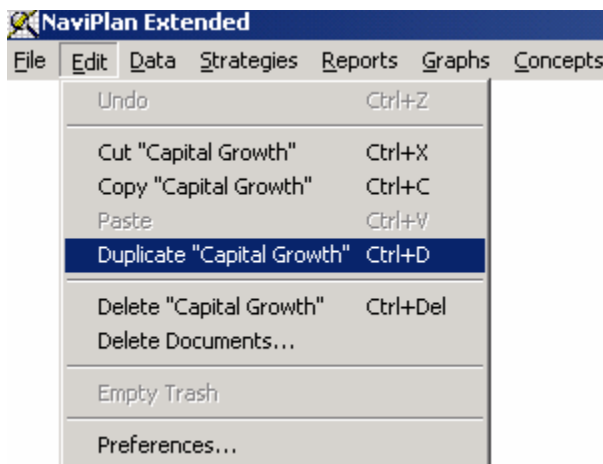
The screenshot shows the 'Capital Growth Concept Setup' dialog box. It contains the following fields and values:

- Concept Name:** Capital Growth
- Projection Criteria:**
 - Initial Market Value: \$100,000.00
 - Initial Cost Basis: \$100,000.00
 - Average Tax Rate: 22.00%
 - Starting Year: 2005
 - Starting Age: 40
 - Growth Period: 20 (years)
 - Inflation Rate: 3.00%
- Return Rates** (with an unchecked for Interest Only):
 - Interest: 6.00%
 - Dividends: 0.00%
 - Capital Gains: 0.00%
 - Deferred Growth: 0.00%
 - Tax Free: 0.00%

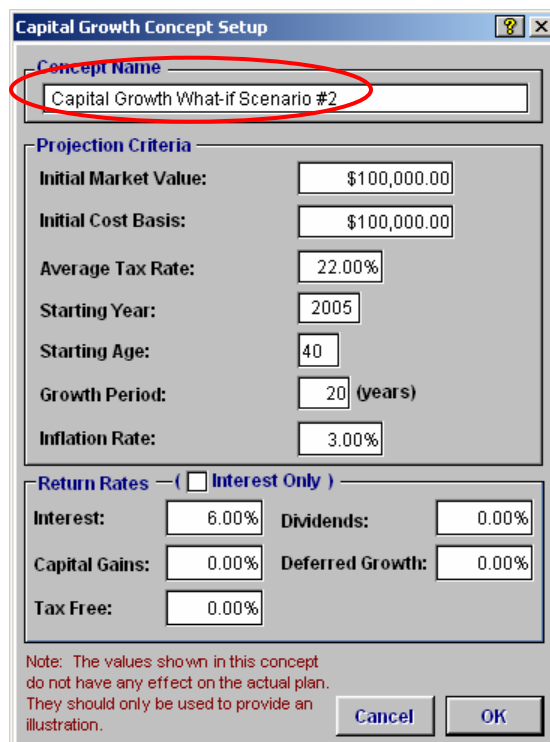
Note: The values shown in this concept do not have any effect on the actual plan. They should only be used to provide an illustration.

Buttons: Cancel, OK

3. When you have finished entering data, click **OK**. The appropriate report, table, or graph appears.
4. Duplicate the concept to create another What-if scenario, by either right-clicking the blue title bar of the concept, or by selecting *Edit – Duplicate <concept name>* from the menu.



After the concept has been duplicated, click the **Edit** button at the bottom of the new concept. A concept payout dialog box opens where you can change the name of the new concept as well as change its variables, thereby creating another What-if scenario.



- 5. Minimize the concept. The new concept can now be differentiated from the original by its unique name.

