

## Changing investment objectives in NaviPlan Standard

You can change the investment objective for an education goal or a major purchase goal so that it is different from the investment objective set for the entire plan.

To do this, go to the **Goals** category, and then click either the **Education** tab or the **Major Purchase** tab. Select the appropriate goal, and then click **Edit**.

In the detailed dialog box for this goal, under *Investment Objective (for this goal)*, the default selection is *<same as for rest of plan>*. To change this to a specific objective, make a selection from the list of investment objectives.

**Education Goal** [?] [X]

**Goal Information**

Description:  **Investment Objective (for this goal):**

Costs Indexed by  Inflation +  =

**Select Field to Calculate** Select one of the radio buttons to control which field the program should calculate automatically. E.g. to see the maximum education expense you can afford with your **existing** assets and savings plans, select *Calculate – Yearly Education Costs* and enter \$0 under Additional Savings.

**Additional Savings**

**Yearly Education Costs**

| Member Name | Current Age | Education Start Age | Yearly Education Costs | Number of Years | Total Projected Cost |
|-------------|-------------|---------------------|------------------------|-----------------|----------------------|
|             |             |                     |                        |                 |                      |

**Total:**

**Additional Savings**  monthly  indexed by Inflation

Override  Starting  To

**Linked Assets...** **Current Value**  **Value in 2005**   
After Tax After Tax **without** Additional Savings