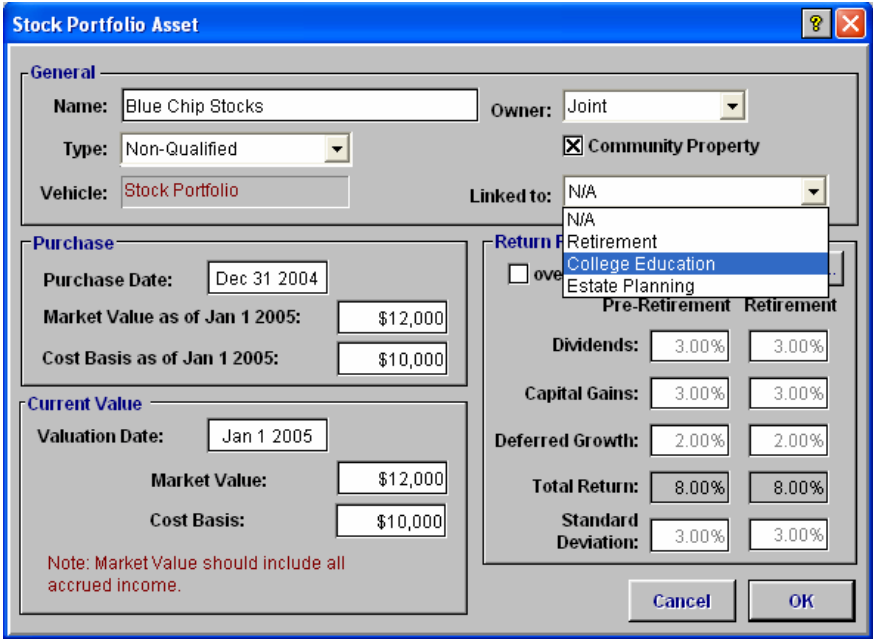


Linking goals and assets

There are two methods to choose from when you want to link a goal to an asset. Both methods described below assume that both the goal and the asset have already been entered into the plan.

From the Assets category

In the Assets category, within the detailed asset dialog box for the asset, there is a *Linked to* field with a list that contains the clients' assets. Select the desired goal from the list, and then click OK. The link will be complete.



From the Goals category

In the *Goals* category, click the **Linked Assets** button on the *Retirement* tab. For education and major purchase goals, double click or select the goal on the *Education* or *Major Purchase* tab, and then click the **Edit** button. The goal's dialog box opens, and then click the **Linked Assets** button.

Education Goal

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
Grant	39	40	\$0	4	\$0

Total:

Additional Savings monthly indexed by inflation

Override Starting To

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

The *Asset – Goal link* dialog box opens. Under *Assets available* select the asset to link to the goal. Once the asset is highlighted, the *Link* button becomes accessible. Click the **Link** button to move the asset to *Assets linked*.

Asset - Goal link

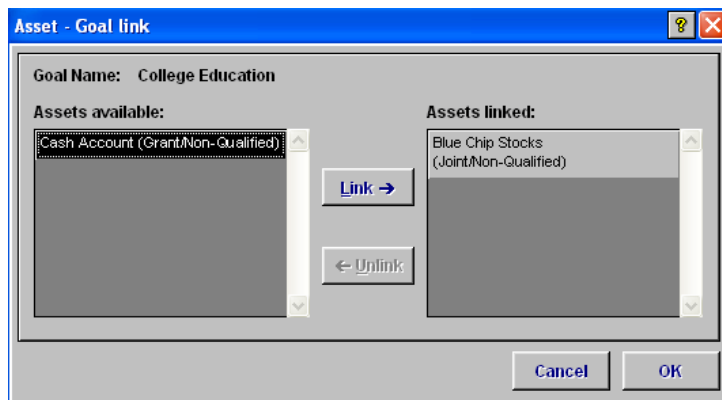
Goal Name: College Education

Assets available:

- Blue Chip Stocks (Joint/Non-Qualified)
- Cash Account (Grant/Non-Qualified)

Assets linked:

To link an additional asset, simply repeat the process.



To remove assets, select the asset you want to remove. The *Unlink* button becomes accessible. Click the *Unlink* button to remove the asset from *Assets linked*.