The *Planning Assistant* category

Did you know that the *Planning Assistant* category can assist you in analyzing your clients' plan?

The *Planning Assistant* projects plans into the future and organizes the details into the following tabs:

- **Overview:** Defines the purpose of the *Planning Assistant* and includes a brief description of each section.
- **Problems:** Shows any possible problems you should be aware of, such as overcontributions to an IRA.
- **Questions:** Lists any questionable strategies or data, such as assets not linked to any goals.
- **Opportunities:** Highlights any possibilities available to you, such as cash flow surpluses or unused contribution room.
- **Reports:** Includes the *IRAs* report, the *Cash Flow* report, and the *Overcontributions* report.