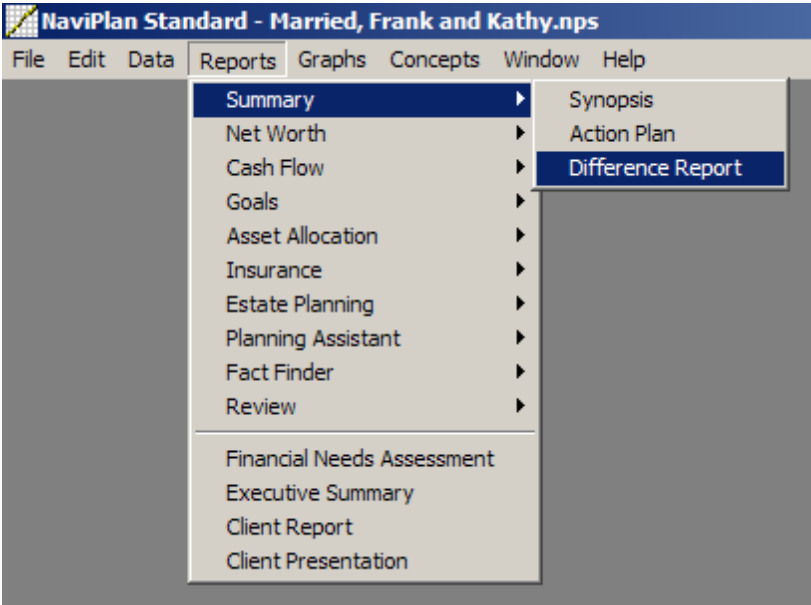


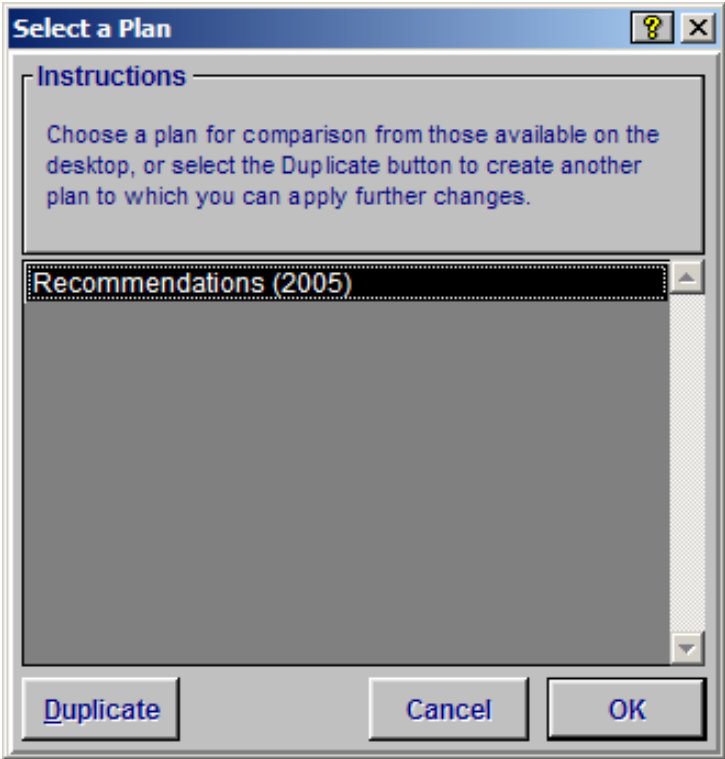
### Tracking the difference between plans

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

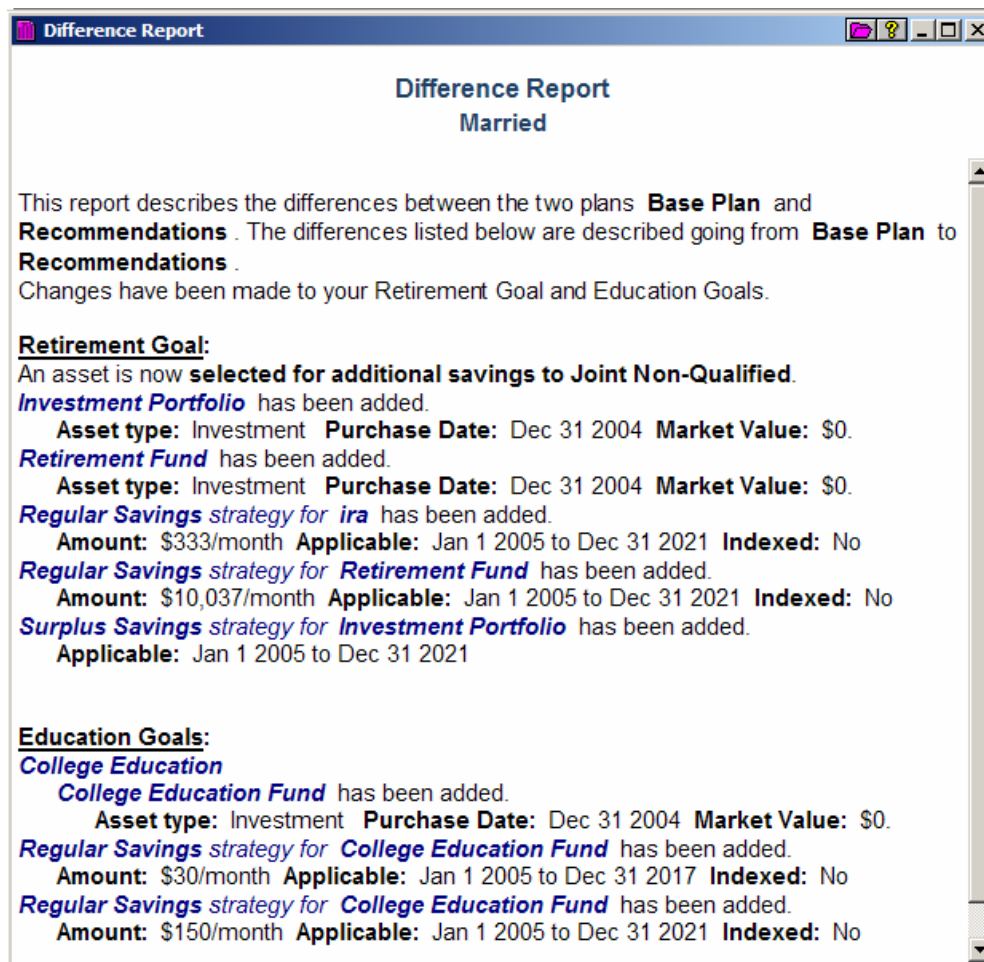
1. Go to the **Reports** menu, and then select **Summary – Difference Report**.



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**  
Married

This report describes the differences between the two plans **Base Plan** and **Recommendations**. The differences listed below are described going from **Base Plan** to **Recommendations**.  
Changes have been made to your Retirement Goal and Education Goals.

**Retirement Goal:**  
An asset is now **selected for additional savings to Joint Non-Qualified**.  
**Investment Portfolio** has been added.  
**Asset type:** Investment **Purchase Date:** Dec 31 2004 **Market Value:** \$0.  
**Retirement Fund** has been added.  
**Asset type:** Investment **Purchase Date:** Dec 31 2004 **Market Value:** \$0.  
**Regular Savings strategy for ira** has been added.  
**Amount:** \$333/month **Applicable:** Jan 1 2005 to Dec 31 2021 **Indexed:** No  
**Regular Savings strategy for Retirement Fund** has been added.  
**Amount:** \$10,037/month **Applicable:** Jan 1 2005 to Dec 31 2021 **Indexed:** No  
**Surplus Savings strategy for Investment Portfolio** has been added.  
**Applicable:** Jan 1 2005 to Dec 31 2021

**Education Goals:**  
**College Education**  
**College Education Fund** has been added.  
**Asset type:** Investment **Purchase Date:** Dec 31 2004 **Market Value:** \$0.  
**Regular Savings strategy for College Education Fund** has been added.  
**Amount:** \$30/month **Applicable:** Jan 1 2005 to Dec 31 2017 **Indexed:** No  
**Regular Savings strategy for College Education Fund** has been added.  
**Amount:** \$150/month **Applicable:** Jan 1 2005 to Dec 31 2021 **Indexed:** No