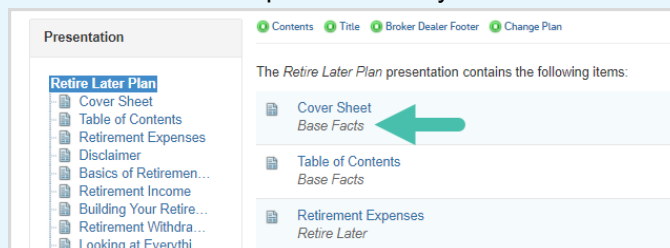


# Changing Plans in Presentations

Change Plan will allow you to select a Plan and/or What-If that will flow through all reports included in the presentation that allow a Plan or What-If to be applied. This feature is available in the following areas of the application: Presentations, Goal Planning Presentation, and Facts Presentation.

## Note:

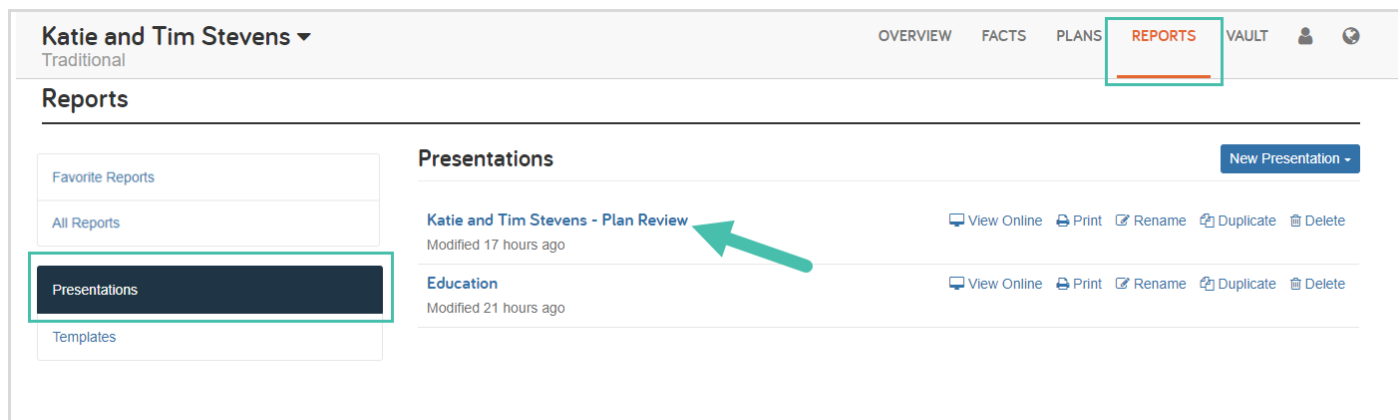
- If you cannot apply a Plan or What-If to a report individually it will be noted in the report subtitle as **Base Facts**.



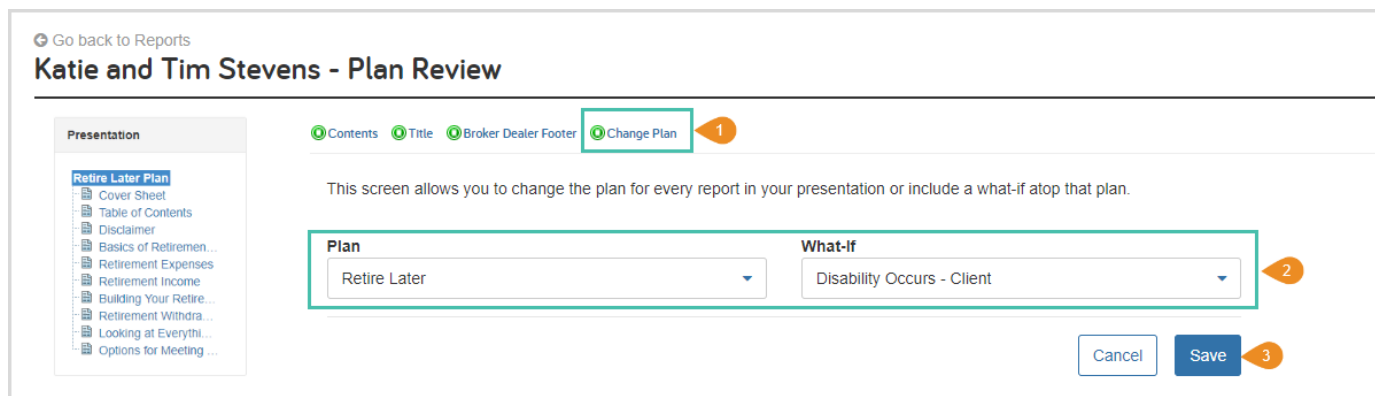
- The top-level Plan and What-If selections will override any report level selections, but you can apply a specific Plan and/or What-if to individual reports prior to generating the Word or PDF document.

## Presentations

- From the **Presentations** section of the Reports page, open a presentation.



- Select **Change Plan**, then click the drop-down under **Plan** and/or **What-if** to make a selection. Click **Save** to finish.



# Changing Plans in Presentations

## Goal Planning Presentation

1) From the Goal Planner page, click **Go to Presentation**.

Katie and Tim Stevens ▾  
Traditional

OVERVIEW FACTS **PLANS** REPORTS VAULT

Go back to Plans

**GOALPLANNER**

Probability of Success  
 ● 82% - 100%  
 ● 70% - 81%  
 ● 0% - 69%

This analysis illustrates the potential results of your financial plan using 1000 randomly generated market returns and volatility called trial runs.

CURRENT SITUATION

96%

Probability of Success

Go to Presentation

Add Comparison ▾

2) Select **Change Plan**, then click the drop-down under **Plan** and/or **What-if** to make a selection. Click **Save** to finish.

Go back to Plans > Goal Planner

**Goal Planning Presentation**

Presentation

Contents Title Broker Dealer Footer **Change Plan** 1

This screen allows you to change the plan for every report in your presentation or include a what-if atop that plan. To facilitate this change, choose the desired plan or what-if for the entire presentation from the drop-downs available below and click on 'Save'.

Plan - What-If - 2

Cancel Save 3

Goal Planning  
 Cover Sheet  
 Table of Contents  
 Disclaimer  
 Profile  
 Observations  
 Balance Sheet  
 Income and Savings ...  
 Liabilities and Expe...  
 Asset Allocation  
 Goals

## Facts Presentation

3) From the Facts page, click **Go to Presentation** then follow the Change Plan steps listed above.

Go back to Reports > Presentations > Edit

**Facts**

Advanced Go to Presentation

Family & Friends

Family & Friends

	Katie Stevens	Tim Stevens
Date of Birth	7/15/1980 (Age 40)	4/3/1981 (Age 40)
Gender	Female	Male
Retirement Age	65	65
Life Expectancy ?	95	95
Children	Relationship	Age
Eva Stevens	Child	8
Jack Stevens	Child	5

Financial Priorities

Goals

Net Worth

Income

Expenses & Taxes

Savings & Contributions

Asset Allocation

Protection

Observations & Next Steps