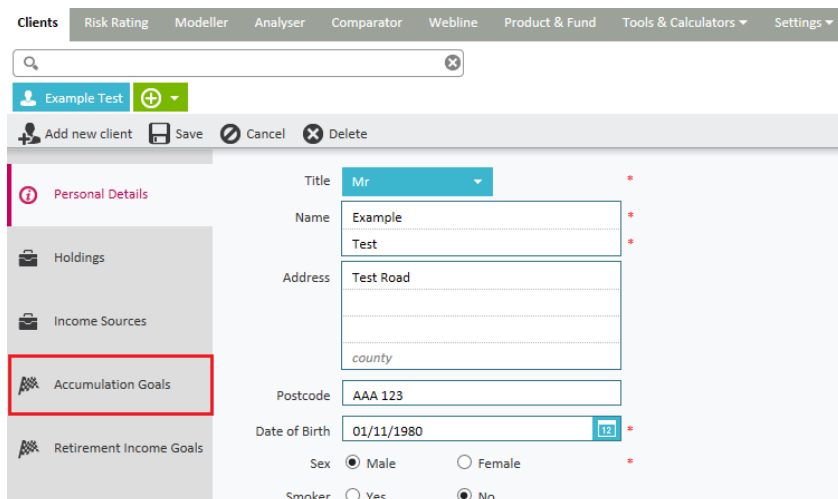


Finding Existing Goals

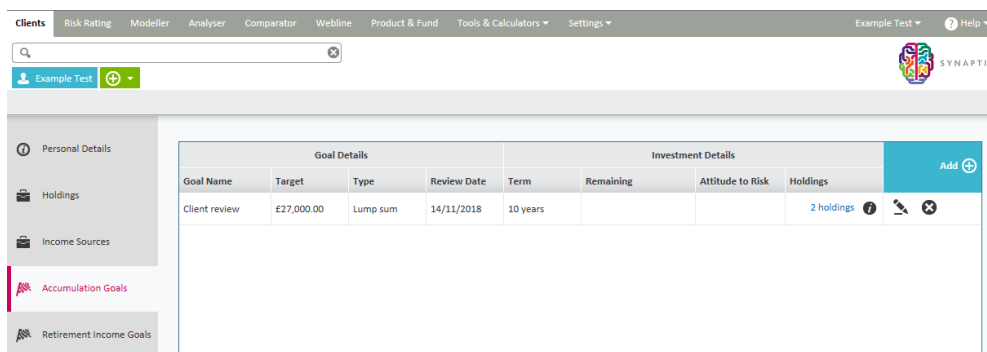
Last Modified on 23/11/2017 4:33 pm GMT

Once a goal has been added and modelled it can be located at a later date by finding the client and clicking on Goals within the client's record:



The screenshot shows a web application interface for client management. At the top, there is a navigation bar with tabs: Clients, Risk Rating, Modeller, Analyser, Comparator, Weblines, Product & Fund, Tools & Calculators, and Settings. Below this is a search bar and a dropdown menu for 'Example Test'. A toolbar contains 'Add new client', 'Save', 'Cancel', and 'Delete' buttons. The main content area is a form for 'Personal Details'. The 'Accumulation Goals' section is highlighted with a red box. The form fields include: Title (Mr), Name (Example Test), Address (Test Road), Postcode (AAA 123), Date of Birth (01/11/1980), Sex (Male), and Smoker (No).

Once this has been clicked, a list of all the Goals recorded for this client will be displayed:



The screenshot shows the 'Goals' section of the client record. It features a table with columns for Goal Name, Target, Type, Review Date, Term, Remaining, Attitude to Risk, and Holdings. There are two rows of data. The first row is for 'Client review' with a target of £27,000.00, type 'Lump sum', review date '14/11/2018', and term '10 years'. The second row is for 'wedding' with a target of £10,000.00, type 'Lump sum', review date '14/11/2018', and term '10 years'. The 'wedding' goal has a magnifying glass icon next to it, indicating it is completed. The 'Client review' goal has an edit pen icon next to it, indicating it is in progress. An 'Add' button is visible in the top right corner of the table.

| Goal Name | Target | Type | Review Date | Term | Remaining | Attitude to Risk | Holdings |
|---------------|------------|----------|-------------|----------|-----------|------------------|------------|
| Client review | £27,000.00 | Lump sum | 14/11/2018 | 10 years | | | 2 holdings |
| wedding | £10,000.00 | Lump sum | 14/11/2018 | 10 years | | | |

There are two goals displayed here. The second goal journey called 'wedding' is completed. This is indicated by the magnifying glass symbol on the right hand side of the screen alongside the completed goal. Click on this to review this goal.

The first goal 'child care fees' is currently in progress as indicated by the Edit pen on the right hand side of the screen alongside the completed goal. To continue with this goal, click on the pen and it will open.

In this screen you can also add the basics of a new goal to resume later by clicking the Add button and filling in the criteria as shown on the next page.

