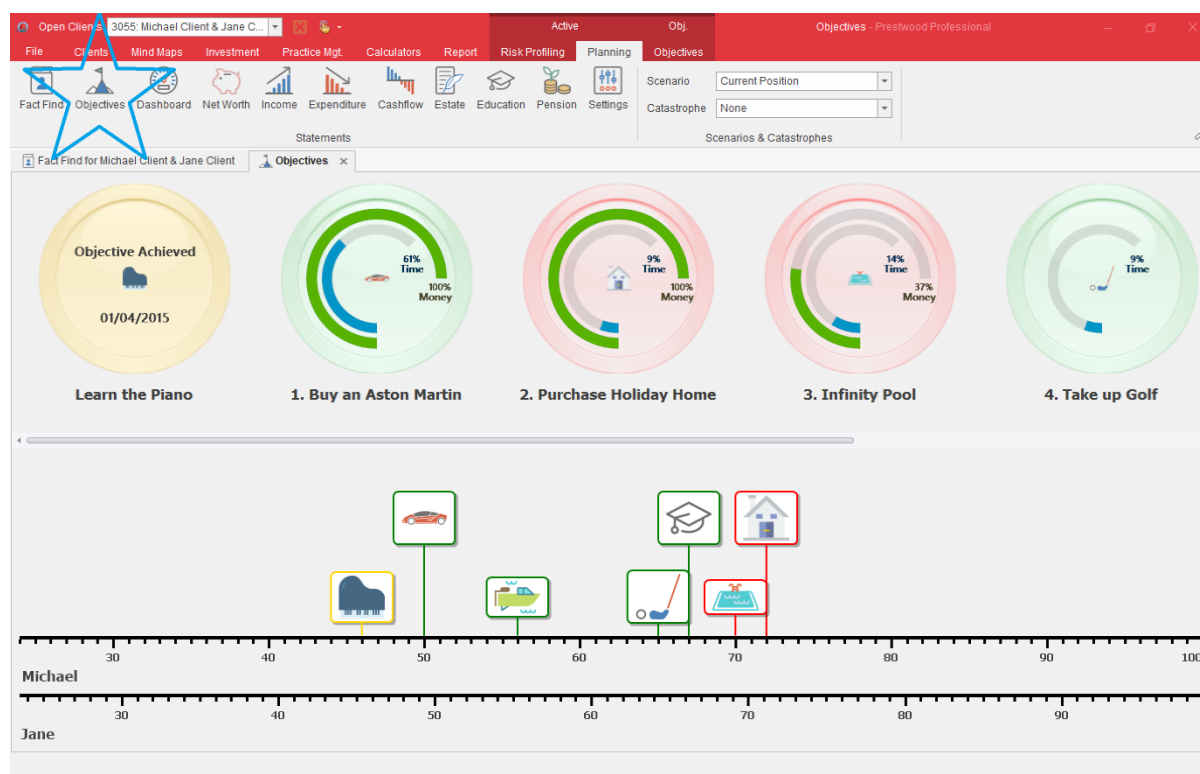
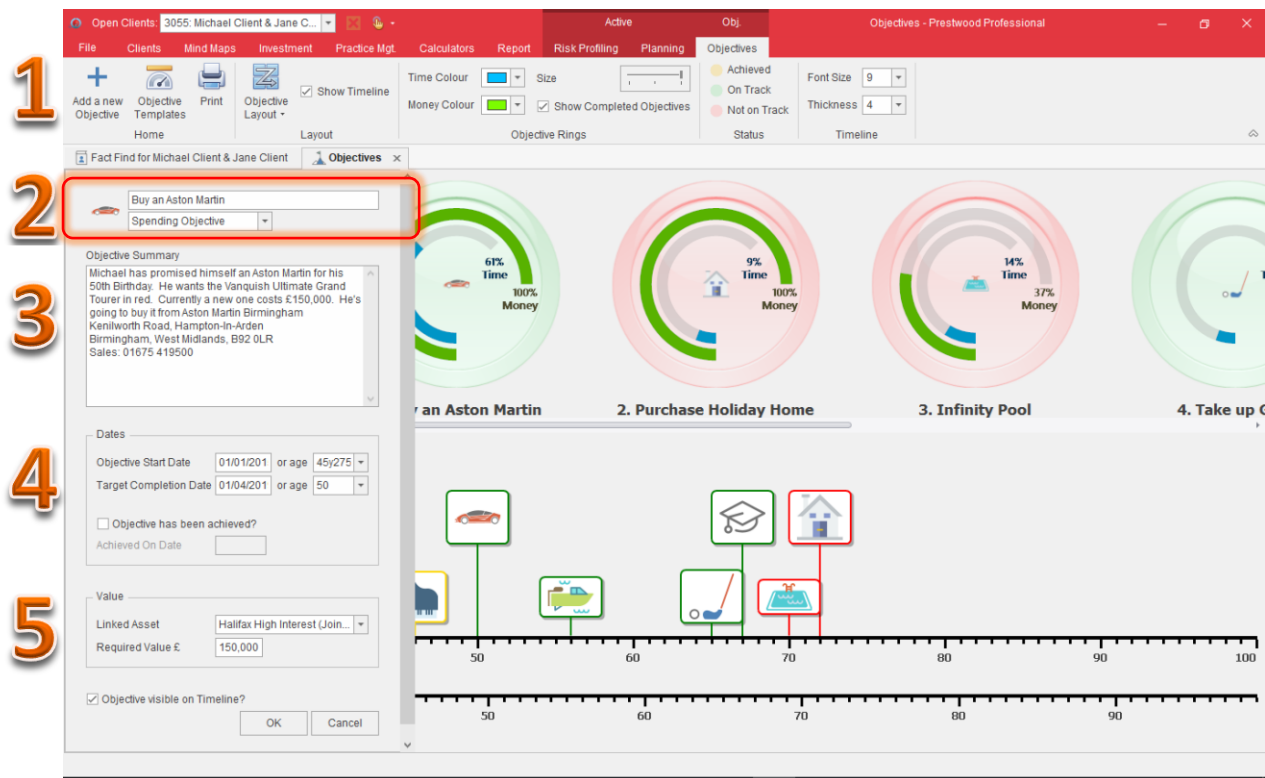


# Objectives



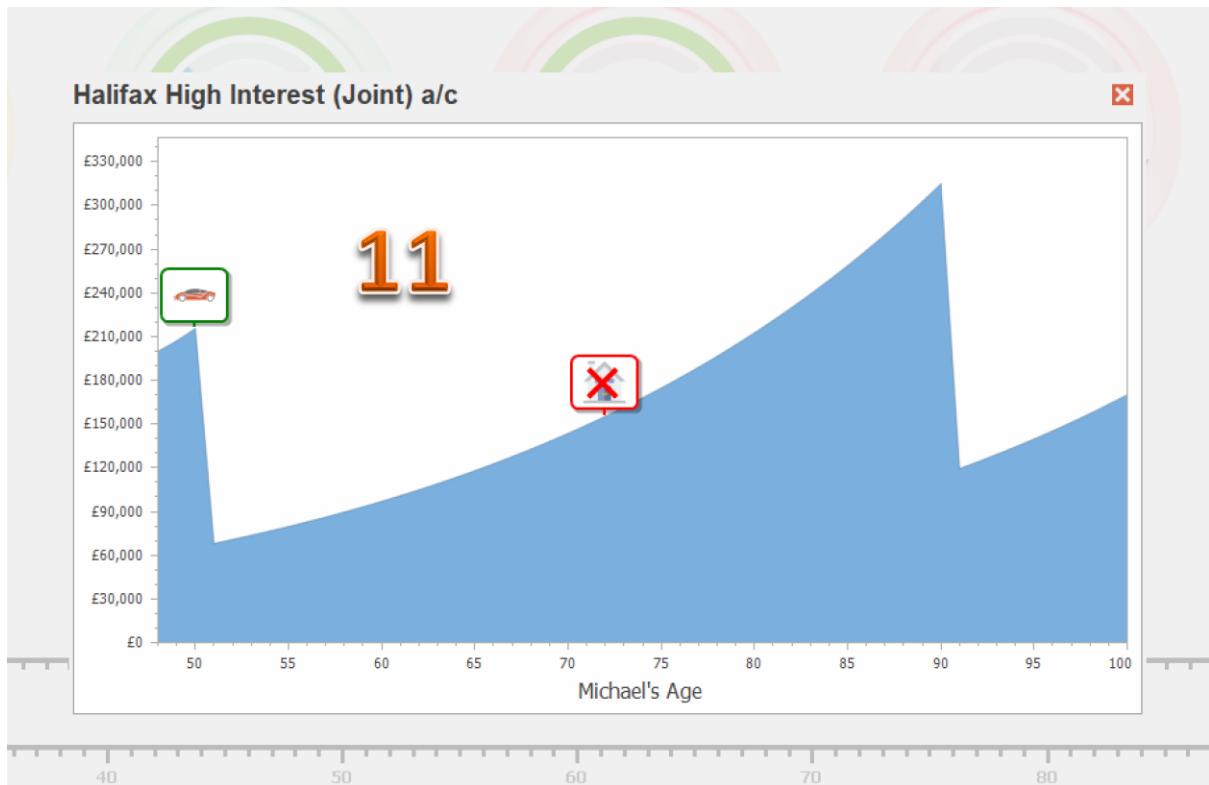
- The new statement, available from the Planning menu, is a place to record and prioritise client objectives.
- Each objective can either be a:
  - Spending Objective
    - Something that needs to be paid for with a known cost, start date and target completion date. e.g. buy a sports car in 5 years' time.
  - Saving Objective
    - Something to be accumulated with a start and target completion date. e.g. to have 1 million pounds in a bank account.
  - Non-financial Objective
    - Something they'd simply like to be able to do that may not have a cost, e.g. learn the piano, give up smoking, lose weight.
- Financial objectives can be linked to items (e.g. a bank account) and the software will monitor the value of the item and let you know whether the objective is **on track**, **not on track**, or even **achieved**.
- An interactive timeline of the objectives is available.






1. Add a new Objective. Choose from our template objective ideas or a bespoke one.
2. Give the Objective a short description. Click on the image picker to select from our range of icons. Select the type of objective.
3. Write up more detail about the objective.
4. Enter the start date of the objective and the target completion date. If the objective has been achieved, then say when and keep track of everything you've already achieved together.
5. If it's a financial objective, then specify the value and where the money will be invested/withdrawn from.



6. Objective gauge colour status. Objective is **on track**, **not on track**, or even **achieved**.
7. Hover over the gauge for the objective summary. Here we can see the Infinity Pool objective is not on track. The projected value of the share portfolio earmarked for the pool won't be enough at the objective goal date. Therefore the gauge is **red** and the border on the timeline annotation for the pool is also **red**.
8. The number to the left of each objective indicates the objective priority. Drag and drop the gauge to increase/lower the priority.
9. Set the colour for the time and money percentages to appear on each objective gauge. Non-financial objectives only have a time gauge.
10. Drag the objectives along the timeline to amend the target completion date.



11. Right-click on any gauge to edit, delete or chart a financial objective. Here we can see two objectives linked to the same bank account. There will be enough money to buy the car, but then not enough left to buy the holiday home.
12. Print the objectives directly from the statement or include them in your comprehensive financial plan design.

Objective, Priority & Status	Description	Summary
<b>Learn the Piano</b> 	To take tuition twice per week and achieve grade 5.	Objective Start: 01/04/2009 Objective End: 01/04/2015  Status: Achieved
<b>1. Buy an Aston Martin</b> 	Michael has promised himself an Aston Martin for his 50th Birthday. He wants the Vanquish Ultimate Grand Tourer in red. Currently a new one costs £150,000. He's going to buy it from Aston Martin Birmingham Kenilworth Road, Hampton-In-Arden Birmingham, West Midlands, B92 0LR Sales: 01675 419500	Objective Start: 01/01/2015 Objective End: 01/04/2019  Value: £150,000 Status: On Track  Funded via: Halifax High Interest (Joint) a/c Current Value: £201,971 Projected Value: £215,614
<b>2. Purchase Holiday Home</b> 	Michael & Jane wish to buy a villa in Spain when Michael reaches age 55. They intend to visit for a long weekend every month. They're hoping to be on the coast near	Objective Start: 01/04/2015 Objective End: 01/04/2041  Value: £160,000 Status: Not On Track

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