

# GOAL GREEN

Introducing  
Goal Planning & Monitoring,  
financial planning software designed to  
put you on the path to realize your goals.



**RAYMOND JAMES®**

# Play Zone®

## Goals

Mary's Retirement Age:

Charles's Retirement Age:

Needs

Retirement - Basic Living Expense:

Wants

Travel:

Car / Truck:

Wishes

Gift or Donation:

New Home:

[Savings >](#)

[Portfolio\(s\) and Average Returns >](#)



Goal Planning & Monitoring is designed to put you in control of your future. Along with your financial advisor, you can develop a plan that will help you visualize your future so you can enjoy the wealth you've worked hard to build.

Together, you and your advisor can create a customized goal plan, test adjustments in real time and predict your retirement readiness – making sure you're in the "green zone."

## Steps to creating your plan and getting results

### 1. GOAL CREATION

The planning process starts with a question: What does your ideal retirement look like? Allow yourself to dream a little. Think of how much you would like to spend on things such as travel, charity, home improvements or even a new car.



### 2. IDENTIFY RESOURCES

You'll get a better understanding of your overall financial picture with the ability to view your income and assets – the foundation of your plan and the key to achieving your goals – in one place. Navigating complex resources such as Social Security is made easier with tools like the Social Security Analysis.

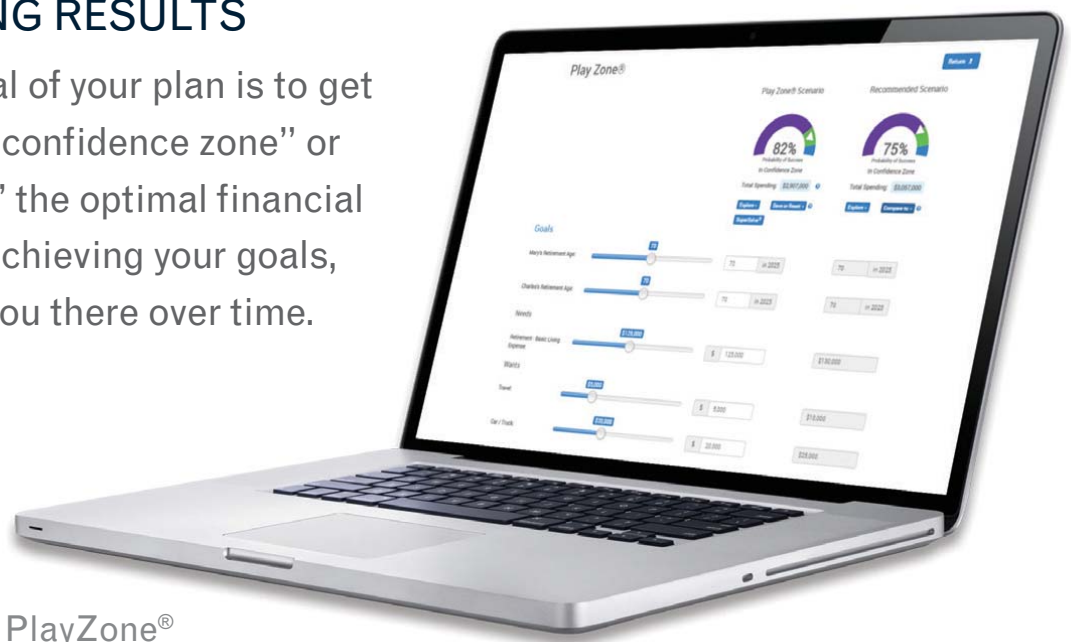
### 3. YOU AND THE MARKET

Understanding how the markets work and your comfort with taking risk is the key to a successful plan. Your advisor can use the software to help you understand your tolerance for risk, explaining market cycles and helping you identify scenarios that might cause you to rethink your long-term investment strategy.

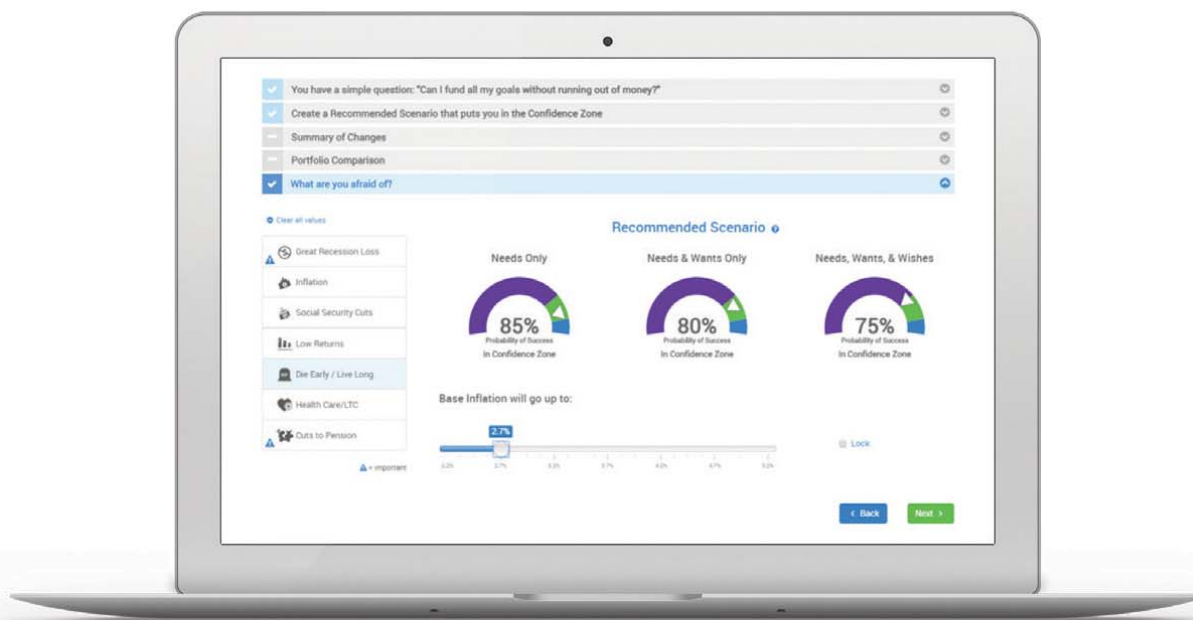


### 4. GETTING RESULTS

The main goal of your plan is to get you into the “confidence zone” or “green zone,” the optimal financial position for achieving your goals, and to keep you there over time.



Using interactive features like PlayZone® and What Are You Afraid Of?®, you can instantly see how changes, small or large, impact the success of your plan and stress-test your choices to help you feel confident that, even through changes, you'll stay on track.



## What Are You Afraid Of?®

Once you and your advisor have worked together to create your plan, you can use Goal Planning & Monitoring regularly to check your progress. Ask your advisor how you can easily keep up with your plan.

To learn more about Goal Planning & Monitoring and start on the path to your goal “green zone,” contact your advisor today.

**IMPORTANT:** The projections or other information generated by Goal Planning & Monitoring regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.

These images are reproduced from the Goal Planning & Monitoring financial planning software, ©PIEtech, Inc. Used with permission. All rights reserved.



To learn more about Goal Planning & Monitoring  
and start on the path to your “goal green,”  
contact your advisor today.

# RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863

RAYMONDJAMES.COM

Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value.

© 2017 Raymond James & Associates, Inc., member New York Stock Exchange/SIPC.

© 2017 Raymond James Financial Services, Inc., member FINRA/SIPC.

Raymond James® is a registered trademark of Raymond James Financial, Inc. FPST-00460516 JD/KM 2/17