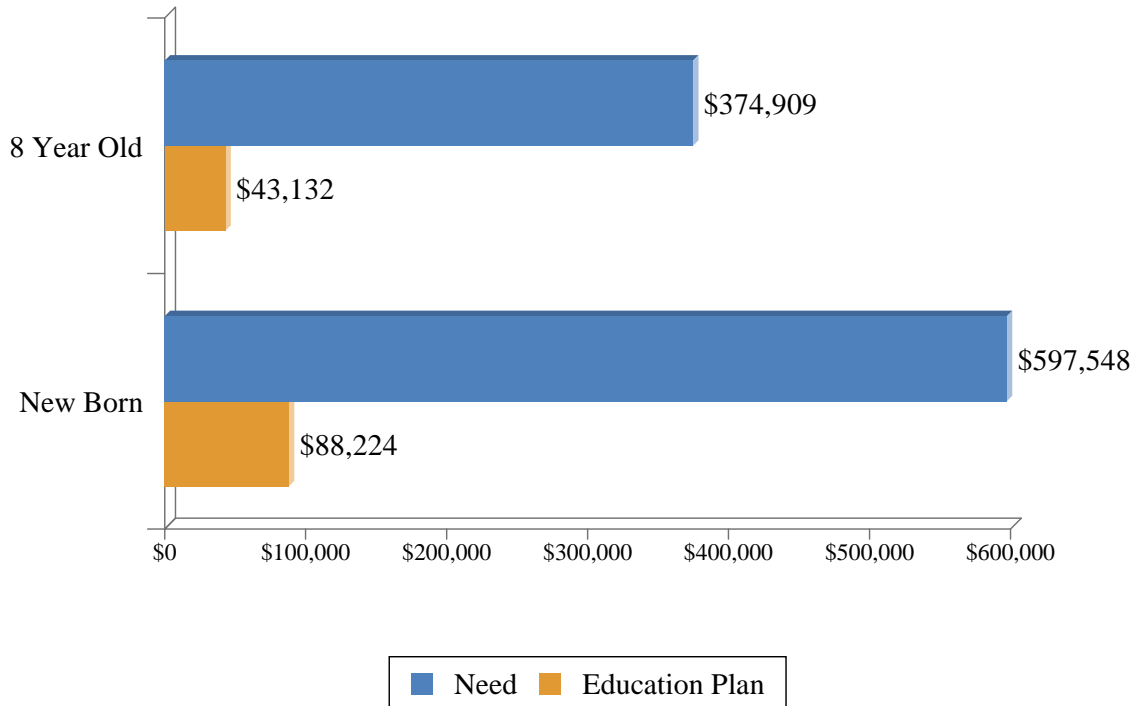




# Education Goals

*Total Education Need \$972,457*

*Your Education Plan Provides \$131,356*



This graph illustrates the projected capital needed to meet your education objectives and how your projected current savings and investments are helping meet the objectives.

<i>Name</i>	<i>Amount Needed Per Year (Today's \$)</i>	<i>Funding Alternatives<sup>1</sup></i>		
		<i>Additional Sum<sup>1</sup></i>	<i>Additional Monthly Level Savings</i>	<i>Additional Monthly Inflating Savings<sup>2</sup></i>
8 Year Old	\$47,855	\$167,774	\$1,419	\$1,196
New Born	47,855	160,786	1,050	810
<b>Totals</b>	<b>\$95,710</b>	<b>\$328,560</b>	<b>\$2,469</b>	<b>\$2,005</b>

<sup>1</sup> Single-sum investment alternative assumes that existing savings will continue and Funding Alternatives earn an assumed rate of return of 6.00%.

<sup>2</sup> The amount shown is for the first year only; this amount must be increased annually by the assumed inflation rate of 3.00%.

These results are hypothetical and are not a promise of future performance.

**\*DRAFT PRESENTATION\***  
**Education Goals**  
*Summary*

**Education Goals:**

<i>Goal Number</i>	<i>Name</i>	<i>School</i>	<i>Annual Amount Needed</i>	<i>Years Until Needed</i>	<i>Years Needed</i>	<i>Inflated at</i>	<i>Amount Needed Future Dollars</i>
1	8 Year Old	University of St. Thomas	\$47,855	10	4	6.00%	\$374,909
2	New Born	University of St. Thomas	47,855	18	4	6.00%	597,548
<b>Total amount needed - future dollars</b>							<b>\$972,457</b>

**Assets and Savings Available:**

<i>Accounts</i>	<i>Current Market Value</i>	<i>-----Monthly Savings-----</i>			
		<i>Amount</i>	<i>Year Savings Start</i>	<i>Number of Years to Save</i>	<i>Assigned to Goal</i>
529 for 8 Year Old					
529 for 8 Year Old	\$0	\$200	2016	14	1
529 for New Born					
529 for New Born	\$0	\$200	2016	22	2
<b>Total</b>	<b>\$0</b>				

**Funding Alternatives:**

	<i>Amount Needed Future Dollars</i>	<i>Existing Plan Provides</i>	<i>-----Additional Amount Needed<sup>1</sup>-----</i>		
			<i>Single Sum</i>	<i>Monthly Level Savings</i>	<i>Monthly Inflating Savings<sup>2</sup></i>
8 Year Old	\$374,909	\$43,132	\$167,774	\$1,419	\$1,196
New Born	597,548	88,224	160,786	1,050	810
<b>Total</b>	<b>\$972,457</b>	<b>\$131,356</b>	<b>\$328,560</b>	<b>\$2,469</b>	<b>\$2,005</b>

<sup>1</sup> All additional savings begin today and assume a rate of return of 6.00%.

<sup>2</sup> Inflating savings will increase annually by 3.00%.