

YOUR PERSONAL FINANCIAL WEBSITE

# A More Efficient Goals Experience Coming Soon

Your Personal Financial Management website makes it easy to manage both your wealth and your well-being.

We are redesigning the Goals Page on your Personal Financial Management website to provide you with a more personalized and streamlined experience.

## What's Changing on the Goals Page?

This enhancement will enable you to view all your goal details simply and efficiently on a single page. It will also provide you with consistency between the financial plan visuals and charts that you are already accustomed to seeing throughout other areas of the financial planning experience.

In addition, it will provide us with an opportunity to deepen our conversations around your goals to make sure you're on target to achieve what's most important to you.

