

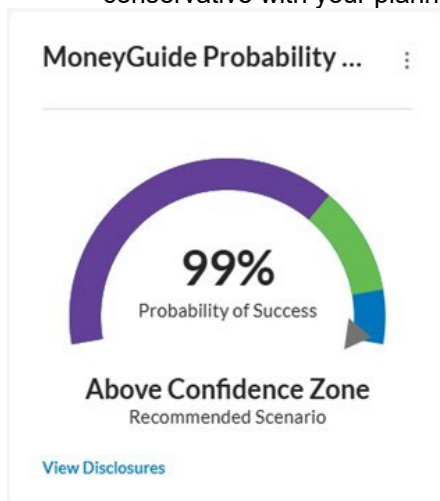
# MoneyGuide Financial Plan Results in Envestnet Client Portal

Your financial plan results are now available for you to review and follow in your Client Portal.

## MoneyGuide Probability Meter

When you log into the Envestnet Client Portal, towards the bottom of the page you will see your Probability of Success meter. The meter indicates the score of your financial plan based on recommendations made by your Advisor. The Probability of Success percentage shows you the likelihood of reaching the financial goals you discussed with your advisor.

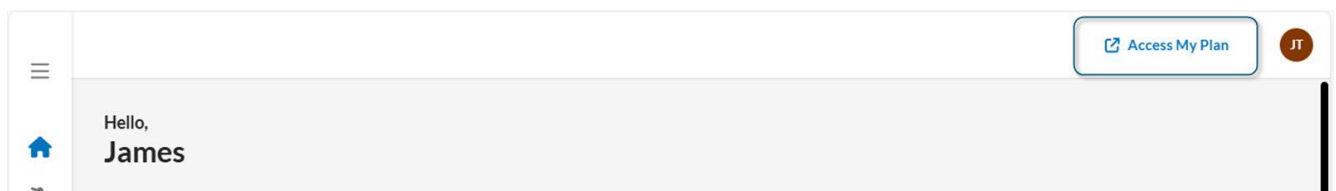
- Below Confidence Zone (purple) - too much uncertainty for your age. Not enough protection against future shocks.
- In Confidence Zone (green) - Good balance between current and future lifestyle. May hold up well against future shocks.
- Above Confidence Zone (blue) - Probably giving up more than necessary now. Ok if you are ultra-conservative with your planning.



## “Access My Plan” launches MoneyGuide Client Portal

On the Home page of your Envestnet Client Portal, in the upper right hand corner there is a link titled **Access My Plan**. Use this to access the Snapshot for your plan, check on the progress toward your goals and view the up-to-date recommended results.

This concise and interactive template allows you to review the Recommended Scenario, track net worth, access saved reports, and utilize interactive tools such as “What Are You Afraid Of?” and the “PlayZone®”.



A new browser tab will open to display your plan's snapshot of the "Recommended Scenario".

**James & Sophia**  
Here is a snapshot of the Recommended Scenario.

Snapshot as of July 08, 2025.

**Probability of Success**  
Above Confidence Zone ⚠️  
99%  
Adjust your plan in Play Zone®

**Your Upcoming Goals**

| Year | Goal                              | Expense Amount |
|------|-----------------------------------|----------------|
| 2027 | Cooking Lessons (Recurs annually) | \$500          |

**Net Worth**  
\$1,778,743  
Assets: \$1,778,743  
Liabilities: \$0

1. View the details of your goals, net worth, and asset allocation.
2. Click "Adjust your plan in PlayZone" on the Probability of Success tile to try out alternate actions and view how it affects your plan results.

**Play Zone® Scenario**  
Save Explore Reset

Probability of Success Above Confidence Zone  
Total Spending \$1,883,670  
99%

**COMPARE TO Recommended Scenario**  
Explore Change  
Probability of Success Above Confidence Zone  
Total Spending \$1,883,670  
99%

**MILESTONES**


| Person                  | Current Age | Target Age |
|-------------------------|-------------|------------|
| James' Retirement Age   | 70          | 2040       |
| Sophia's Retirement Age | 65          | 2035       |


**GOALS**


| Goal  | Current Value   | Target Value       |
|---|-----------------|--------------------|
| Retirement - Basic Living Expense (Needs - Recurring) | \$80,000        | \$ 80,000 per year |
| Health Care (Needs - Recurring)                       | 100% or \$5,242 | \$ 5,242 per year  |
| Wedding (Wants - One-Time Expense)                    | \$100,000       | \$ 100,000         |

3. Scroll to the bottom to explore further including:


- **My Blocks** - An interactive template, including individual Blocks, that allow you to explore and discover powerful answers to complex questions. Each Block is centered around an important financial conversation, such as credit card and college debt, setting up an emergency fund, insurance, saving for special purchases, and more.
- **PlayZone** - Be involved by “sliding” the way to a plan that you like. A fun and easy way to try new possibilities. You can save a scenario as your “Client Favorite” so you can discuss ways to incorporate your ideas with your advisor.
- **Compare Current** - Provides a side-by-side comparison of the Current Scenario against Recommended Scenario.
- **What are you Afraid of?** - Makes it easy to see how changes in key financial factors would affect the Probability of Success for your Needs, Wants, and Wishes.
- **Explore Even More** - Includes options for details such as Inside the Numbers, Details for Average Returns, Details by Goal, Details for Bad Timing, Asset Allocation, Stress Tests, Social Security, and Understanding Results.
- **Star Track** - Provides a visual summary of your progress toward achieving your financial goals over time for previously tracked plans.
- **Report History** - Generates a list of the PDF reports that have been shared from your Advisor.

 Dive Deeper Into Your Results




 **My Blocks®**


My Blocks®, our interactive financial planning tool, helps you tackle complex financial topics with fun and easy to understand modules.

 **Play Zone®**


Quickly adjust plan specifics such as retirement age or goal amounts and immediately see the impact on your plan results.

 **Compare to Current**


Take a closer look with this in-depth tool that highlights the changes presented in the Recommended Scenario.

 **What Are You Afraid Of?**


Will your plan hold up in a tough spot? Use these stress tests to evaluate how certain challenges could impact your plan.

 **Explore Even More ...**

Dive deeper into the numbers with an array of views to help you better understand your result and examine your plan in greater detail.

 **Star Track**

Provides a visual summary of your plan progress over time by tracking probability of success, goal spending, and net worth.

 **Report History**

View your previously saved reports.

