



What's New in Version 1.5 of the goalgamiPro for Salesforce App

With Version 1.5 of the goalgamiPro Salesforce app, we have introduced a new Disclaimer Text field for the report that allows each firm or individual user to specify standard disclaimer text to include in the goalgamiPro report so that each time you create a report the same disclaimer text will be included.

The text entered in the Disclaimer Text field appears as part of the Notes page in the goalgamiPro report after any user-entered notes text.

A screenshot of a report's "Notes and Disclosures" page. The page header includes "Notes and Disclosures", "Prepared for Jacobsen Family", and "Jul 10, 2014". The main content area is titled "USER-ENTERED NOTES TEXT" and contains several paragraphs of disclaimer text. An orange bracket on the right side of the page groups the disclaimer text, with a callout box labeled "Disclaimer text" pointing to it.

Notes and Disclosures Prepared for Jacobsen Family Jul 10, 2014

USER-ENTERED NOTES TEXT

This analysis will be based on the information and assumptions that you provided. You should not use it to obtain credit or for any purposes other than financial planning. Any tax aspects presented are for illustration only, and are based on current federal tax law and assumed tax rates.

Depicted rates of return are hypothetical and are not representative of the actual rate of return that you will experience with any particular insurance or financial product. Actual results will vary depending on the insurance or investment you purchase, the amount of premiums or payments you make, the benefits, charges, expenses, guaranteed (if any) and non-guaranteed elements of the insurance policy or product, and general market conditions. Asset allocation does not ensure a profit or protect against losses in a declining market.

IMPORTANT: The projections or other information generated by this analysis regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.

The attached report is delivered to you in conjunction with the services contracted through Target Wealth Financial Group. Investment adviser representatives of Target Wealth Financial Group who are registered representatives offer securities through TWA Investments, Inc., a registered broker/dealer, Member FINRA/SIPC, subsidiary of Target Wealth Financial Group.

Disclaimer text

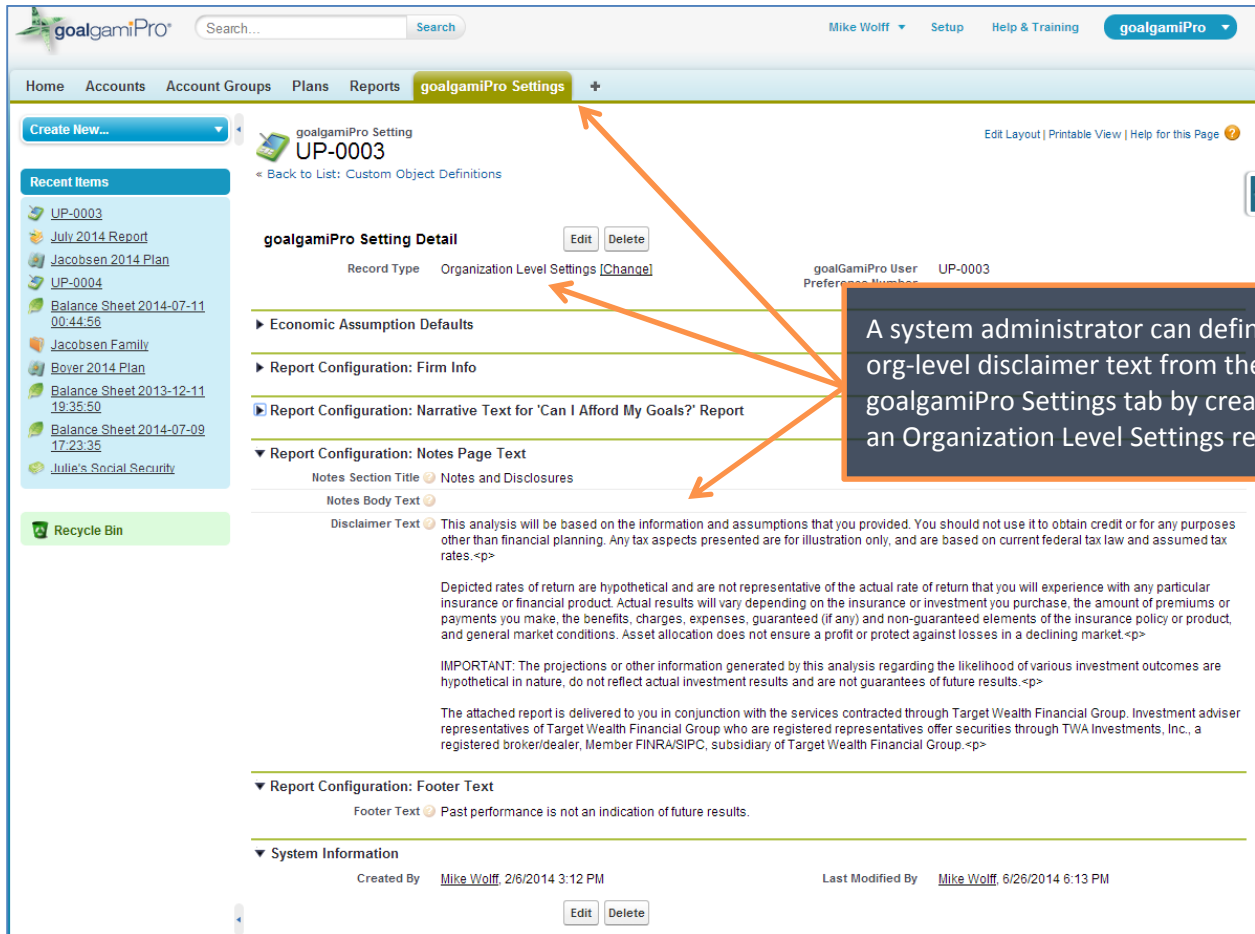
The goalgamiPro app provides several ways that Disclaimer Text can get set and used.

1. At an org-level by your Salesforce system administrator through the goalgamiPro Settings tab.
2. At a user-level by each advisor through the goalgamiPro Settings tab.
3. At a plan-level by turning off the default report info for a plan and entering the plan specific disclaimer text.
4. At a report-level by entering disclaimer text for a specific report.

NOTE: To utilize the Disclaimer Text field, your Salesforce system administrator must first make the field accessible. Please refer to the "Adding Disclaimer Text Field to your Salesforce Org" configuration guide available from our knowledge base.

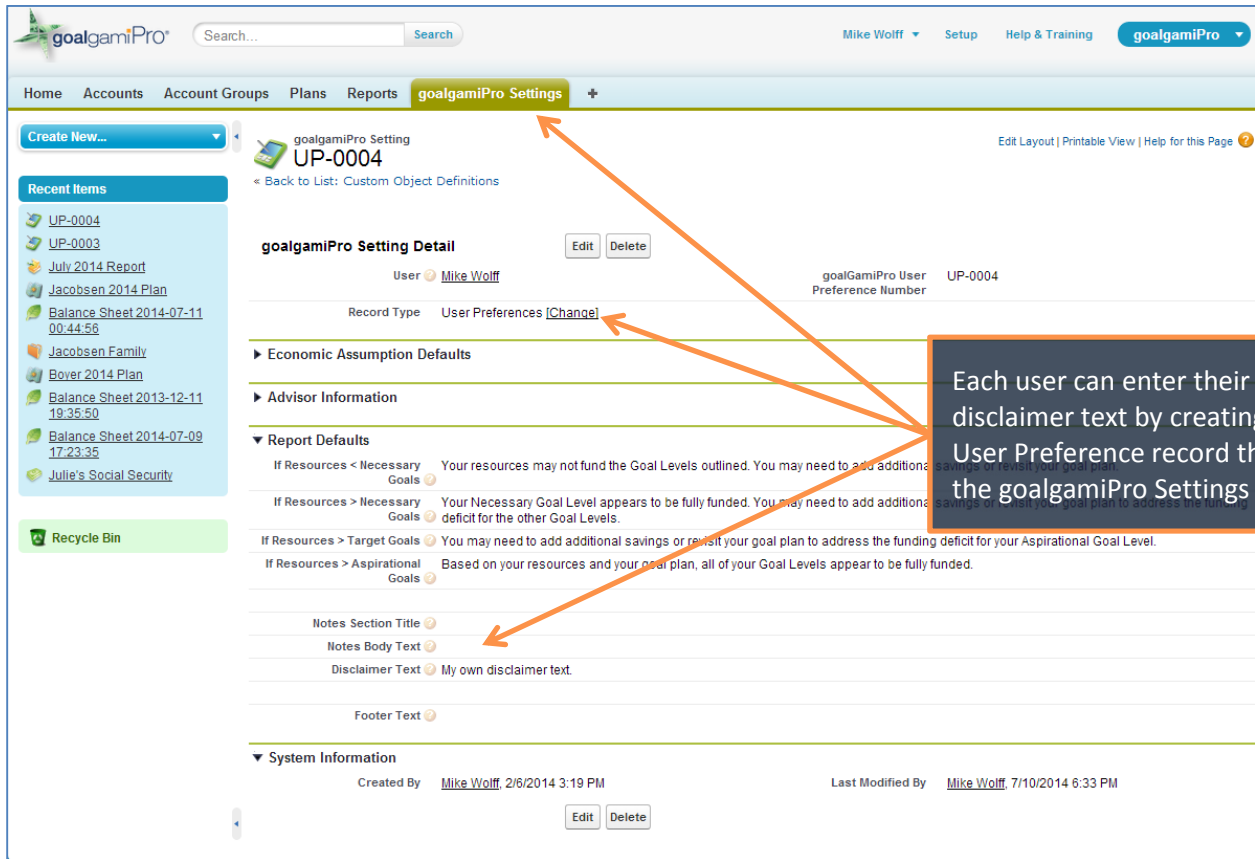
Org-Level Disclaimer Text

Your Salesforce system administrator can enter disclaimer text for the entire org through the goalgamiPro Settings tab so that all plans and reports will inherit that disclaimer text by default.



User-Level Disclaimer Text

If your Salesforce system administrator allows for advisors to create their own User Preference record through the goalgamiPro Settings tab, then each user can enter their own disclaimer text that will override the org-level disclaimer text and be inherited by each plan and report created by that user.



goalgamiPro Setting
UP-0004

Back to List: Custom Object Definitions

goalgamiPro Setting Detail

User: Mike Wolff

goalGamiPro User Preference Number: UP-0004

Record Type: User Preferences [Change](#)

Economic Assumption Defaults

Advisor Information

Report Defaults

If Resources < Necessary Goals: Your resources may not fund the Goal Levels outlined. You may need to add additional savings or visit your goal plan to address the funding deficit for the other Goal Levels.

If Resources > Necessary Goals: Your Necessary Goal Level appears to be fully funded. You may need to add additional savings or visit your goal plan to address the funding deficit for the other Goal Levels.

If Resources > Target Goals: You may need to add additional savings or revisit your goal plan to address the funding deficit for your Aspirational Goal Level.

If Resources > Aspirational Goals: Based on your resources and your goal plan, all of your Goal Levels appear to be fully funded.

Notes Section Title

Notes Body Text

Disclaimer Text: My own disclaimer text.

Footer Text

System Information

Created By: Mike Wolff, 2/6/2014 3:19 PM

Last Modified By: Mike Wolff, 7/10/2014 6:33 PM

Plan-Level Disclaimer Text

For each goalgamiPro plan, a user can either utilize the default disclaimer text specified at either the org or user level, or the user can customize the disclaimer text for a specific plan.

If your Salesforce org has org-level disclaimer text defined and you also have disclaimer text defined as a user preference, then your disclaimer text entered as a user preference will take precedence and be used as the default disclaimer text for a plan.

NOTE: In order to enter disclaimer text for a plan, the Salesforce system administrator must grant the user permission to edit the Disclaimer Text field.

goalgamiPro Search... Search Mike Wolff Setup Help & Training goalgamiPro

Home Accounts Account Groups **Plans** Reports goalgamiPro Settings +

Create New... Plan **Jacobsen 2014 Plan** Customize Page | Edit Layout | Printable View | Help for this Page

Recent Items

- Jacobsen 2014 Plan
- UP-0004
- UP-0003
- July 2014 Report
- Balance Sheet 2014-07-11 00:44:56
- Jacobsen Family
- Rover 2014 Plan
- Balance Sheet 2013-12-11 19:35:50
- Balance Sheet 2014-07-09 17:23:35
- Julie's Social Security

Recycle Bin

Plan Detail Edit Delete Clone Create Balance Sheet

Information

Account Name Jacobsen Family Help Site Help for this page

Plan Name Jacobsen 2014 Plan Comments

Status Draft Available to Other Applications

Account Group

Principal Information

Tax Information

Economic Assumptions

Advisor Information

Report Information

*Prepared For Name Jacobsen Family

Notes Section Title Notes and Disclosures

Notes Body Text USER-ENTERED NOTES TEXT

Disclaimer Text This analysis will be based on the information and assumptions that you provided. You should not use it to obtain credit or for any purposes other than financial planning. Any tax aspects presented are for illustration only, and are based on current federal tax law and assumed tax rates.<p>

Depicted rates of return are hypothetical and are not representative of the actual rate of return that you will experience with any particular insurance or financial product. Actual results will vary depending on the insurance or investment you purchase, the amount of premiums or payments you make, the benefits, charges, expenses, guaranteed (if any) and non-guaranteed elements of the insurance policy or product, and general market conditions. Asset allocation does not ensure a profit or protect against losses in a declining market.<p>

IMPORTANT: The projections or other information generated by this analysis regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.<p>

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Footer Text Past performance is not an indication of future results.

Disclaimer text entered for a plan.

Report Information

Use Default Report Info?

*Prepared For Name Jacobsen Family

Notes Section Title Notes and Disclosures

Notes Body Text USER-ENTERED NOTES TEXT

Disclaimer Text This analysis will be based on the information and assumptions that you provided. You should not use it to obtain credit or for any purposes other than financial planning. Any tax aspects presented are for illustration only, and are based on current federal tax law and assumed tax rates.<p>

Footer Text Past performance is not a

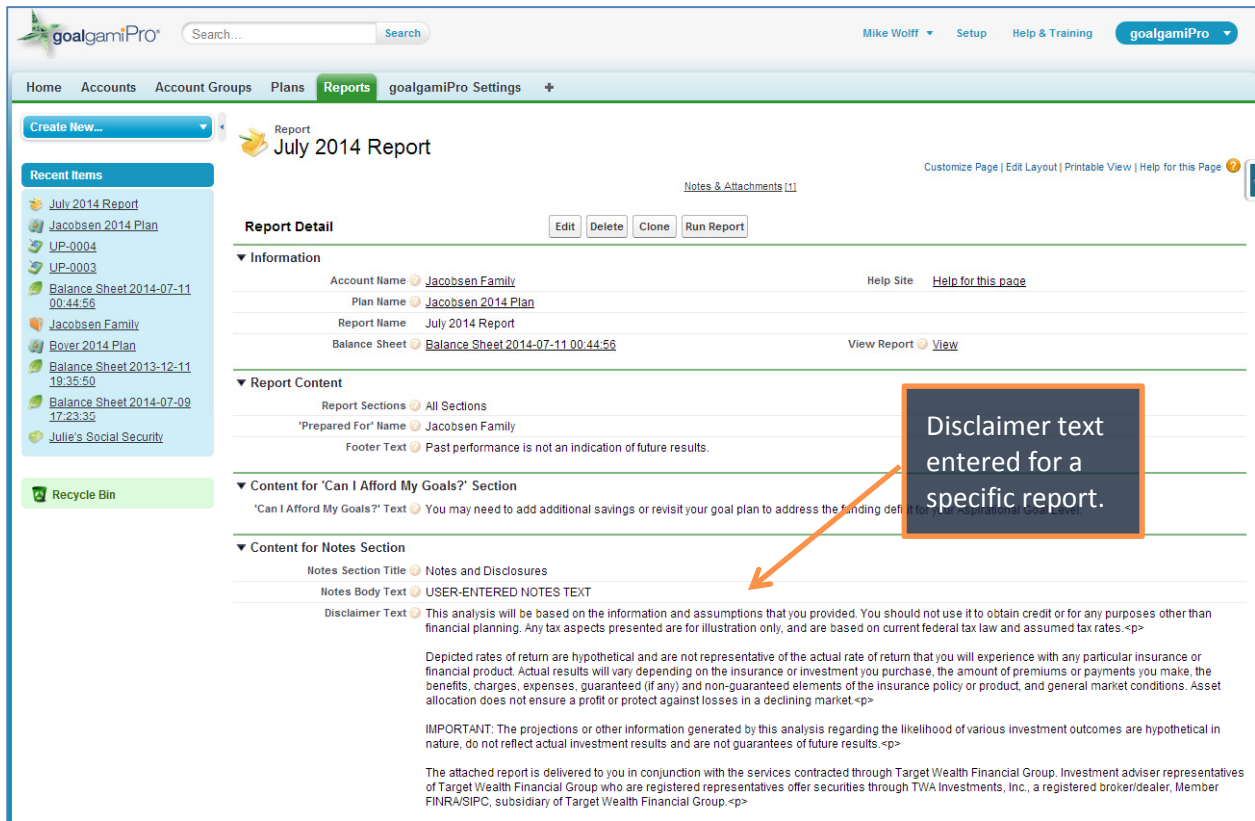
If checked, then plan will use default disclaimer text defined at either org or user level.

You can enter custom disclaimer text for the plan if 'Use Default Report Info?' is not checked.

Report-Level Disclaimer Text

For each goalgamiPro report, a user can either keep the disclaimer text entered for the plan or customize the disclaimer text for the specific report.

NOTE: In order to enter disclaimer text for a report, the Salesforce system administrator must grant the user permission to edit the Disclaimer Text field.



The screenshot shows the 'July 2014 Report' page in the goalgamiPro Salesforce App. The page is divided into several sections:

- Report Detail:** Includes fields for Account Name (Jacobsen Family), Plan Name (Jacobsen 2014 Plan), Report Name (July 2014 Report), and Balance Sheet (Balance Sheet 2014-07-11 00:44:56).
- Report Content:** Includes fields for Report Sections (All Sections), Prepared For Name (Jacobsen Family), and Footer Text (Past performance is not an indication of future results).
- Content for 'Can I Afford My Goals?' Section:** Includes a field for 'Can I Afford My Goals?' Text (You may need to add additional savings or revisit your goal plan to address the funding def...).
- Content for Notes Section:** Includes fields for Notes Section Title (Notes and Disclosures), Notes Body Text (USER-ENTERED NOTES TEXT), and Disclaimer Text.

The Disclaimer Text field is highlighted with a red box, and an orange arrow points to it from a text box that says "Disclaimer text entered for a specific report."

Support

Please make sure to check out our Knowledge Base (<https://advisorsoftwareinc.zendesk.com/categories/20112357-goalGamiPro-for-Salesforce-App>) for frequently asked questions about the goalgamiPro Salesforce App.

You can also contact us with questions via:

- Our support portal at http://support.advisorsoftware.com/anonymous_requests/new, or
- Email at advisorsupport@advisorsoftware.com