



compounding

SAVINGS GOAL - Example

Southwest Airlines (LUV)	COMPANY
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RATE OF RETURN	
1Y	5Y
23.37%	463.80%

GOAL: College Fund	SAVINGS GOAL: \$25,000	CURRENT SAVINGS: \$1,000	# OF YEARS: 8
COMPOUNDING	RATE OF RETURN (ANNUAL INTEREST %)		MONTHLY SAVINGS RATE
Annually	23.37%		\$88.00

YOUR SAVINGS GOAL

	COMPANY
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RATE OF RETURN	
1Y	5Y

GOAL:	SAVINGS GOAL:	CURRENT SAVINGS:	# OF YEARS:
COMPOUNDING	RATE OF RETURN (ANNUAL INTEREST %)		MONTHLY SAVINGS RATE

YOUR SAVINGS GOAL

	COMPANY
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RATE OF RETURN	
1Y	5Y

GOAL:	SAVINGS GOAL:	CURRENT SAVINGS:	# OF YEARS:
COMPOUNDING	RATE OF RETURN (ANNUAL INTEREST %)		MONTHLY SAVINGS RATE



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Time Goal - Example

Walmart (WMT)	COMPANY
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RATE OF RETURN	
1Y	5Y
11.63%	16.09%

GOAL: Retirement		RATE OF RETURN: 11.63%		COMPOUNDING: Annually	
CURRENT SAVINGS	SAVINGS GOAL	MONTHLY SAVINGS	TIME TO GOAL		
\$5,000	\$1,000,000	\$500	26 years and 7 months		

Your Time Goal

	COMPANY
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RATE OF RETURN	
1Y	5Y

GOAL:		RATE OF RETURN:		COMPOUNDING:	
CURRENT SAVINGS	SAVINGS GOAL	MONTHLY SAVINGS	TIME TO GOAL		

Your Time Goal

	COMPANY
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RATE OF RETURN	
1Y	5Y

GOAL:		RATE OF RETURN:		COMPOUNDING:	
CURRENT SAVINGS	SAVINGS GOAL	MONTHLY SAVINGS	TIME TO GOAL		