

ProManage

Scavenger Hunt

Check the boxes as you complete each task as you explore ProManage *Vision*:

- After you login, reset assumption, reset objectives, and then press the View Strategy button at the bottom right. *Note the suggested approach improves the chances of success, but there is a trade-off in reduced satisfaction. Trade-offs is what conjoint analysis is all about!*
- Go to What-if and see what happens when you change the retirement date from 66 to 67 and back.
- Go Back to Results note you can print an individual report reflecting your updated suggestions.
- View Objectives and change the retirement age at which this person would like to retire to 58 and the importance level to Extremely Important
- Change desired retirement income to 100% of final pay and Extremely Important
- Change the savings rate staying at 5% to Somewhat Important
- Change the importance level of minimizing risk in a poor year to Not Important
- On the Objectives Trade-off page choose retiring earlier as much more important than retiring with more income and choose taking less risk as much more important than retiring earlier.
- Resolve inconsistencies in priorities by choosing the highlighted choices
- Note the revised summary of objectives and the relative weightings of their importance
- View the revised strategy
- Play more what-if games; try changing assumptions and when you are done, logout. *Note the system will save one's changes for next time.*