

QUICK START GUIDE



Getting Started with Voyant Snapshot

Connect your accounts using Snapshot and keep track of where you're at versus where you should be. Need help signing in? [Learn more.](#)

Ring Charts

The ring chart represents plan start, current, and projected values as a percentage of the highest projected value that a category reaches in the plan. The maximum value is shown at the top left of the chart along with the ages of the primary and spouse when the maximum value is achieved.

Project Balances
Drag the slider to compare current balances to projected plan balances in any given year.

Projected Plan Values
Projected values change to reflect the year of the plan selected on the slider.

Toggle Chart View
Click the left and right arrows or swipe left/right to browse multiple data visualizations.

Accounts in the Plan
If an account is added to snapshot without also being added to the plan, an alert will show here. Click the Account Drilldown icon for more details.

People
Hover on the icons to see the people that are currently in your snapshot plan. Click the plus icon to create additional people.

Asset Allocation
Click to see a drilldown view of how the plan's overall asset allocation has changed since the start of the plan.

Account Drilldown
Click the list icon to see account details within each category.

Build your plan
Click the plus button to add items to your snapshot.

Net Worth
74 | 71 | 5,553,377 | £0
837,800

Savings
Current: 24,088 (↑ 0.18%)
Plan Start: 24,044
39 | 36 | 15,315

Asset Allocation
Current: 682,622

Investments
658,084

Property
67 | 64 | 1,101,223 | £0
551,578

Alert: There is 1 account not in the plan.