



PlanPlus Web Advisor World Class Financial Planning Software & Training

Available in English, Chinese 中文, Spanish (Español), and French (Français)

How will you communicate investment recommendations that inspire confidence and trust?

- **Create an Investment Policy Statement that shows:**
 - Current and proposed asset allocation
 - Current and proposed risk and return
 - Recommended specific security sales and purchases
 - Charts and graphs that illustrate the value of long-term investing, diversification, and risk reduction
- **Integrated with** daily Morningstar stock and mutual fund pricing and FinaMetrica Risk Profile



(Included at no extra cost!)

- **Scaleable**, with a selection of documents that let you tailor your client presentations easily from a simple one page report all the way to Comprehensive Investment Policy Statements with security recommendations and impressive graphics and analytics
- **Diverse** multi-currency, multi-language, multi-jurisdiction
- **Integration** with your CRM or platform provider
- **Client-friendly reports** are considered among the best in the industry for client education, ease of understanding and professionalism
- **Training ... training ... and more training**
 - E-learning movies
 - Free training webcasts
 - Customer support

Key Characteristics

- Web-based SaaS (Software as a Service) or host in-house
- Enterprise back office integration
- Complete USA asset allocation model with historical returns
- FinaMetrica Risk Profile
- Morningstar stock and mutual fund data including daily pricing
- Assets & Liabilities at summary or detail level
- Efficient Frontier-based pre-set or custom portfolios
- Security selection with favorites lists, preferred portfolios, and customized implementation strategies
- Financial goals calculators
- Customized Reports:
 - Investment Policy Statement
 - Over 15 additional reports



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VIEW OUR 5 MINUTE PRESENTATION
AND SIGN UP FOR A FREE DEMO
<http://www.planplus.com/USA>



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