



PlanPlus Inc.



FOR IMMEDIATE RELEASE

PlanPlus Releases Web-based Financial Planning Software for Students and Educators

ONTARIO, CANADA – PlanPlus Inc. has just released a Web-based financial planning software for use by students and educators. The software provides students with a variety of planning analyses including net worth, asset allocation, cash and tax management, insurance needs, goal planning, and more. A simple password and UserID allow the student to access the tools in their browser, along with some basic eLearning modules and a student workbook with many examples of how to solve problems.

The timing of the *PlanPlus for Students* coincided with the publication of *Personal Financial Planning 4th edition*, the definitive textbook on personal financial planning. Written by award-winning authors Kwok Ho and Chris Robinson and published by Captus Press Inc., this textbook has become a standard over the past decade, with English language editions in Canada, the United States and Netherlands, and in French for students in Quebec. A translated Chinese edition is also published by the esteemed China Financial Publishing House. Currently, editions for the United Kingdom and Mexico are in the works.

“Many of the colleges and universities that use the *Personal Financial Planning* textbook are preparing students for a career in financial planning, including the basics of their professional designation,” said Randy Hoffman, President of Captus Press. “Instructors are keen to be able to provide students with practical, hands-on experience using software like *PlanPlus for Students*, as students will be better prepared when they graduate and enter the workplace.”

Many educational programs, across Canada and around the world, teach students financial planning. Programs at universities, colleges and by professional associations may also lead to both academic degrees as well as the educational requirements for a professional designation such as a CFP® (Certified Financial Planner). The difficulty is that students graduating from these programs, or attempting to complete the requirements of modules like the Advanced Financial Planning course of most CFP programs, often have little knowledge of how to actually create a financial plan document!

PlanPlus for Students is a practical solution for this problem and it can be easily integrated into academic programs for financial planning and investment planning. Based on PlanPlus' professional financial planning software – Web Advisor, *PlanPlus for Students* helps students solve problems in personal financial planning courses and assists them in learning how to create a financial planning document.

"One of the challenges with introducing technology like financial planning software into academic programs is that educators want to focus on problem-solving in the topic area - not become a support desk for students with software challenges," said Shawn Brayman, President of PlanPlus. "The Web-based delivery of *PlanPlus for Students* means students need only a browser and the Internet and they are in business. This has allowed us to simplify the delivery of the software as well as to add some exciting new features for the student. For example, in the investing planning section, firms like Cannex and Morningstar in Canada, and Lipper in the US, UK and a number of other countries have agreed to make a subset of their mutual fund or stock data available to students to work with in their planning process."

The textbook and the software are designed to complement each other, with many examples throughout the text and exercises at the end of the chapters flagged to indicate they can be solved with the software. If a student prefers, they can always use their calculator or a paper and pencil. In some cases the software is adopted along with the textbook, while others programs might use just the textbook or just the software with their own course materials.

PlanPlus for Students not only supports English and French, but can be used in Spanish (to compliment a scheduled release of the textbook in Mexico for 2006) and Chinese. Like the professional software from PlanPlus, it can be used in a total of 15 different countries including Canada, US and Mexico, with localized asset allocation, tax projections and so on for each country.

“Financial planning has evolved into a global phenomenon with over 20 different countries now recognizing it as a discrete profession,” said Shawn Brayman. “Our unique approach with a multi-lingual and multi-jurisdictional planning tool not only provides a solution for Canadian and US educators, but allows students in markets that are newer to the concepts of financial planning to have access to a valuable learning tool.”

About PlanPlus Inc.

PlanPlus Inc. is a Canadian firm that provides wealth management solutions to financial services firms worldwide with users in North and South America, the Caribbean, Asia and Europe. Our approach is based on 15 years of experience in delivering personal financial planning and investment advisory tools.

About Captus Press

Captus Press is a Toronto-based publisher with a mission to provide informational and educational content in paper and electronic media. Since 1986, Captus Press has built a strong list of innovative textbooks, including the widely received and authoritative *Personal Financial Planning*, for post-secondary education, publications for professionals and the public who need to be informed. True to its innovative nature, in 1997 Captus Press began to collaborate with post-secondary educators and professional institutions to offer extensive Internet learning resources with multimedia and interactivity.

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