



PlanPlus Inc. & the Wealth Enhancement Academy Launch the “Advice Transition Program” Training

CALGARY, ALBERTA June 10, 2007 PlanPlus Inc. and the Wealth Enhancement Academy announce the launch of their new training program called the 'Advice Transition Program' (ATP) at The Canadian Institute of Financial Planners Conference (CIFPs) in Calgary. The 'Advice Transition Program' is a unique practice development program designed to assist financial advisors transform their practice from product first to an advice first approach. The program has been under development for over a year, and has been piloted by advisors from a national IDA firm, as well as an Ontario-based MFDA firm

“Rather than doing the same things better or more efficiently, we show advisors how to truly become their clients personal CFO by doing things differently”, said John Page, President of the Wealth Enhancement Academy. “The ATP program teaches advisors how to secure engagement as the clients’ primary financial advisor and get 100% share of wallet. Advisors know, and studies support the fact that a planning approach generates three to four times the revenue per client, but struggle with how to make the transition in an already busy practice. The ATP is the first program of its kind to show them how.”

The ATP is a one-year program that combines a number of delivery mechanisms such as 30 hours of on-demand eLearning, a series of 30 group-coaching sessions and a one-day capstone seminar to ensure advisors have effectively generated a tailored ‘Perfect Practice Manual’. The program content combines foundational learning, case studies and exercises – all of which walk the advisor through the delivery of modular advice, life goals analysis up to and including integrated financial planning. By the end of the program advisors and their staff will have created a customized process manual that will include a definition of their services, ideal client profiles, practice transition strategies, processes to tier clients to appropriate levels of service and more.

“A phenomenal program!” said Dan Seabrooke, an advisor with Raymond James Financial Inc. “The ATP program provided the guidance we needed to get where we really want to be. The program really does help transition your practice to more fee-based.”

“Although we are in the early stages of the program, we are very pleased with the success thus far”, said John Dunton, Managing Director of Business Development of Farm Mutual Financial Services Inc. “The feedback I am getting back from the advisors is that the program is key in their professional development. The ATP program is a solid program and I am confident that it will be successful.”

“For over 17 years we have watched advisors struggle with the question of how to make financial planning the focus of their business, as opposed to something they just do for a few select clients”, said Shawn Brayman, President of PlanPlus Inc. “This joint venture with the Wealth Enhancement Academy has allowed us to deliver a true comprehensive solution for advisors with world class planning tools and a mechanism to fully integrate this into their business.”

About the Wealth Enhancement Academy

The Wealth Enhancement Academy teaches financial advisors about the Wealth Enhancement Process® financial advisory model. The award-winning model increases ROL, what we refer to as the Return On Life for both the client and the advisor and goes well beyond current trends such as 'life management'. The Wealth Enhancement Process® represents years of development and proven processes that help advisors increase their revenues and develop long-lasting client relationships. Our high-performance programs integrate Process, Knowledge, Tools & Technology necessary to overcome today's industry challenges. The Academy is a major contributor to the Advocis Best Practices Manual since 2002. www.wealthenhancement.ca

About PlanPlus Inc.

PlanPlus Inc. is a Canadian firm that provides wealth management and financial planning software solutions based on their PlanPlus Web Advisor software to financial services firms worldwide. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. Customers include banks, stock brokers/investment firms, insurance, credit union, mutual fund and financial planning firms. PlanPlus is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario. www.planplus.com

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