PlanPlus Plan*it* Subscription Options

PlanPlus Plan*it* is a very flexible software tool designed to meet the planning needs of both our free community users and professional subscribers. Through sophisticated access rights, various functions and features can be turned on and off, based on the individual needs of the user. We can even accommodate multiple regions where functions and features can be unique to different sales channels. This is a powerful feature designed to help companies and individuals subscribe for just the functions and features that they really need.

Below we have provided details for the most common configurations used by companies and individual advisors. If you would like a more in-depth breakdown, we also have a detailed pricing matrix that shows all of the functions and features with full disclosure of pricing for all options. This detailed document is available upon request. Professional Level 2 includes all features from Level 1 while Professional Level 3 incorporates all Level 1 and 2 features.

Subscription Options	Key Features
Community Edition	• Investment Policy Statement (PDF) • A series of Modular Financial Planning Calculators with individual PDF reports
Professional Edition Level 1 Modular Planning*	• Investment Policy Statements (Editable Word documents) • Upgrade to the Modular Retirement Planning Calculator to use Graduated Tax Rates as opposed to Average Tax Rates. • Help Desk support • Detailed asset entry using custom products (when Morningstar data not included) • Single signon and client data integration (Enterprise deployments) • PlanPlus Plan*it* Learning Circle webcast training in available jurisdictions • CE Credits on eLearning where available • Custom branded region in Plan*it* including document and report branding*****
Professional Edition Level 2 Life Planning**	• Life Goals Planning (cash flow based) using graduated tax rates. • Access to our unique Auto Model™ process and the Personal Financial Strategy document along with dozens of other documents (varies by jurisdiction) • The innovative Progress and Accountability Review Process allows you to measure your client's progress and trends (past and present) in a visually pleasing manner.
Professional Edition Level 3 Integrated Planning**	• Enhance your Life Goals Planning by incorporating estate planning, Long Term Care and Critical Illness planning into your client reports • This level is appropriate for advisors holding forth as a financial planner or performing more advanced estate and business planning functions
Advanced Investment Planning Option***	• Investment Policy Statements with the ability to enter detailed holdings into multiple accounts. • Create unlimited "Favourite Product" lists for all users, for specific regions or for individual advisors. • Create your own "Preferred Portfolios" making the investment recommendation process much more efficient. • Security Selection features let you create detailed implementation plans with specific product recommendations based on proprietary investment products (Separately Managed Accounts) or using Morningstar data.
Morningstar Data Integration Option****	• Integration of Morningstar Data for daily pricing and asset allocation information • Also the ability to generate fund fact sheets for the universe of products for the jurisdiction of your subscription. • Note that you can also subscribe for multiple jurisdictions.
FinaMetrica Risk Profile Questionnaire Option	• Psychometric Risk Profile using award winning best of breed risk tolerance questionnaire from FinaMetrica.

* Professional Level 1 is mandatory as the foundation for additional upgrades.

** Life Planning and Integrated Planning features may not yet be available in the all jurisdictions. Check with PlanPlus for details.

*** Advanced Investment Planning cannot be purchased without Morningstar Data

**** Morningstar data not available in all countries.

***** Custom branding is available for a minimum of 5 users

Note: If using back office integration Morningstar Option must be purchased where available