

You Deserve **SMART** Software!



DELIGHT YOUR CLIENTS

Clients want several things from their Advisor:

- to feel listened to
- to be given recommendations that fit their unique needs and desires
- to be given confidence they can have the future they want
- to be presented information in a way they understand

With MoneyGuidePro, you can give your Clients what they want. That's what delights them and makes you look good.

WORK EASIER

Until now, financial software has been powerful but DUMB. It makes you do too much of the repetitive work that is a waste of your time. In other software, you run dozens of alternative scenarios trying to find one that works well for your Client.

With MGP, you click the **SUPER SOLVE™** button and it creates a satisfactory plan in seconds. That's just one example of how **SMART** it is. And because it's so smart, you stop wasting time running the software and have more time for the really important stuff – like talking to prospects and clients, and building a better practice. Now that's **SMART**.



GET MORE "A" CLIENTS

Building a premier practice is all about getting more "A" Clients. If you look good to your current Clients, they give you more and better references. And since you'll have more time freed from software drudgery, you'll be able to spend more quality time with them.

Pricing

List Price

\$1,295

Contact us to see if you are eligible for our Preferred Partner discount.

PRICE INCLUDES

One year license for all modules
Free Phone Support
Free Online Training
Upgrades to new versions
Renew next year for \$1,295

Free Trial

REGISTER TODAY!

Go to www.moneyguidepro.com

Click on the **FREE TRIAL** button to start your **14-Day Free Trial**



MONEYGUIDEPRO™
Financial Planning **SMART**ware

www.moneyguidepro.com

MoneyGuidePro Sales and Support

1-800-841-5312

12 Key Features

3 to Help You Work Easier.

WHAT IF WORKSHEET

The What If Worksheet in MGP is the SMARTEST on the planet. Plus, it's amazingly fast and easy to use. If anyone disagrees, we'd welcome a What If showdown.



This is the "Easy Button" for Financial Advisors. It has 3 major benefits:

- 1) It will save you time and effort by eliminating the frustrating task of trial-and-error plan creation
- 2) It will give you confidence that your recommended plan will be satisfactory to your Client
- 3) It can allow Advisors who are less experienced in financial planning to create better, professional-quality plans

AGGREGATE - INTEGRATE

MoneyGuidePro offers CashEdgePro as an optional add-on product (at extra charge) to provide full Account Aggregation capabilities.

- allows your Clients to create links to all their online accounts
- automatically transfers current account values into your MGP Plan

Plus, MGP integrates with most of your other favorite core applications.



4 To Wow Your Clients.

GOAL WIZARD

The Client's story should always start with their Goals. The full and complete identification of each client's unique Financial Goals is the most important step in the creation of a successful plan. So for something so important, you need to see the Goal Wizard.



SMART PRESENTATION

You craft a brilliant plan for your Clients. Now, you must explain it, and convince them to take action. SMART Presentation makes it easy, by automatically converting your recommended plan into a 5-step interactive, PowerPoint®-like presentation.



PowerPoint® is a registered trademark of the Microsoft Corporation



GUEST SHARING

MGP takes advantage of the unique capabilities of the internet to expand and enhance how you can work with your Clients. Through the Guest Sharing feature, it makes it easy to work with Clients online, anywhere, anytime.



DETAILS

You want Plan Details – MoneyGuidePro Has Them

MGP provides a wide range of detailed reports that are easily accessed online or printed as part of a report.

2 That are Just, Well, Cool.

MGP - MY WAY

Just like Frank Sinatra, most Advisors like to "do it my way". The User Options feature of MGP lets you configure the system to suit you, and how you like to plan.



POWER FEATURES

- Use MGP Standard Classes and Portfolios
- Create your own Classes and Portfolios
- Custom Portfolios
- Portfolio Optimization
- Tax and Inflation Overrides
- Stock Options
- Restricted Stock
- NUA
- 72(t) Distribution



3 That You Asked For.

BUDGET

For Clients who need help freeing up money for additional savings, MGP has a Budget Module.



LIFE - LTC - DISABILITY - ESTATE

MGP provides fully-integrated modules for Insurance and Estate Analysis. Each is designed to be used at two levels:

- 1) One Click – After completing a Financial Goal Plan, clicking one more link will provide an excellent, first-level analysis for Life, LTC, Disability or Estate without any more data entry.
- 2) Advanced – For each module, the user can choose to refine the analysis by providing additional information.

ASSET ALLOCATION

MoneyGuidePro includes a robust set of Asset Allocation capabilities. It can be used both within a Financial Goal Plan and as a separate module.



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