MoneyGuidePro™
Financial Planning SMARTware

The MoneyGuidePro (MGP) Office Configuration was created for groups of advisors who use the same portfolios and asset classes in their MGP Plans. The Office Configuration should be considered by any firm that implements a standardized planning process. Each advisor has her own MGP ID and password, through which she has access to both the firm's clients and her own private clients.

Benefits

- Provides consistency across advisors in MGP planning
- All advisors have direct access to the firm's clients
- Each advisor can create and access his own private clients
- Streamlines MGP customization process (e.g., creating asset classes, portfolios, and correlations)
- Includes MGP sales assistant IDs and passwords, at no additional charge

Pricing

- License for each advisor is either list or PPA price, as applicable
- One additional log-in ID for the Office Manager is included at no additional charge
- Sales assistant log-ins are included at no additional charge
- All IDs in the office have the same custom logo at the cost of $144 each year.

Getting Started

To learn more about the MoneyGuidePro Office Configuration, please contact:

MoneyGuidePro Sales
800.841.5312
sales@moneyguidepro.com

How It Works

- Office Manager ID has the ability to control portfolios and asset classes
- All other IDs automatically use the MGP configuration created by the Office Manager.
- All advisors, then, have the same MGP configuration, including asset classes and portfolios
- All advisors have the same logo
- An advisor creates a private client by checking the "restricted" box, on the Add Client page or, when editing a client's information, on the Profile page
- On the Clients page, an advisor selects whether to search on office clients or his private clients
- If a sales assistant adds a client, they must select (from a drop-down box) the advisor who owns the client. Sales assistants can only search for office-owned clients (i.e., they cannot search for any advisor's private clients)
- There is a unique Purchase page which the Office Manager uses to purchase the advisor licenses and create advisor and sales assistant IDs and passwords. She will have the ability to allow and deny access for advisors and sales assistants. There will be one expiration date for all the Office Configuration licenses. License fees for advisors added after the initial purchase will be pro-rated to the expiration date.