

# Financial Planning Consultants, Inc

Financial Software Since 1975

# The **BUILDER** Suite Training Options

## **BUILDER Suite Workshop**

**Early Bird Special - Register 30 day prior and save 20% off**

**PlanBUILDER** As a beginning or experienced user, this one day program provides significant interaction with the class as you learn **Plan Builder**. Bring your laptop, or use one of our dedicated computers for maximum benefit. You will learn how **Plan Builder** supports the financial planning process while exploring the power of this flexible and powerful tool to motivate your clients to take action now!

\$350	\$250	\$
1 <sup>st</sup> Attendee	Additional Attendee	_____

**PracticeBUILDER – Basic** A one day program that will involve you in the full utilization of **Practice Builder Financial**. You and your staff will operate a Practice Builder system on your own training computer. As a Basic user, you'll be discussing fundamentals of Practice Builder and reviewing the Data Input, Document Maintenance, Filtering and Global Processing.

\$350	\$250	\$
1 <sup>st</sup> Attendee	Additional Attendee	_____

**PracticeBUILDER – Advanced** A one day program that will involve you in the full utilization of **Practice Builder Financial**. You and your staff will operate a Practice Builder system on your own training computer. As an Advanced user, you'll be challenged to set up marketing campaigns, select and modify sequences, and explore all the capabilities of Practice Builder.

\$350	\$250	\$
1 <sup>st</sup> Attendee	Additional Attendee	_____

**Web Training** – Connect through Go To Meeting Center on the Internet (www.gotomeeting.com) for **effective one-on-one training on your computer**.

One Hour	Two Hour	\$
\$175	\$300	_____

**On Site Training** – As an advanced user, this will allow you to customize the training to better use the system and become more productive. Training tailored to your own specific needs for **Practice Builder** or **Plan Builder** and **for multiple staff associates**. Advantageous training on your system in your office environment no travel time spent or expense. (up to 5 attendees) One, two or three day training available. You and staff learn at your own pace.

One Day	Two Day	Three Day	\$
\$1,350	\$2,150	\$2,700	_____

The User will be responsible for other expenses including, coach airfare from Dayton or Cincinnati (FPC will fax an estimate of airfare charge to you for approval before booking), lodging for the entire training period (which will include flying in the night prior and, depending on your location, lodging for the last day of training) and any taxi or incidental expenses incurred by the trainer.

Sub Total	\$
_____	_____
For Delivery in Ohio – Add Appropriate Sales Tax	\$
_____	_____
<b>Total</b>	\$
_____	_____

Name: \_\_\_\_\_ Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Credit Card #: \_\_\_\_\_ Exp: \_\_\_\_\_

Signature: \_\_\_\_\_ American Express/Discover/Master Card /Visa

Questions/Comments: \_\_\_\_\_

**Cancellation Policy:**

Builder Suite Workshop - We reserve the right to cancel the workshop with a 30 day notice. We will email you with confirmation of the Builder Suite Workshop and recommend you **do not** book any travel arrangements until you receive confirmation of the session.

**Minimum required attendance is six.**

**Fax to: 513 424 5752**

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[www.FinancialSoftware.com](http://www.FinancialSoftware.com)

Prices subject to change