The BUILDER Suite

Software, Training & Support for Financial Advisors

Practice Management Solutions

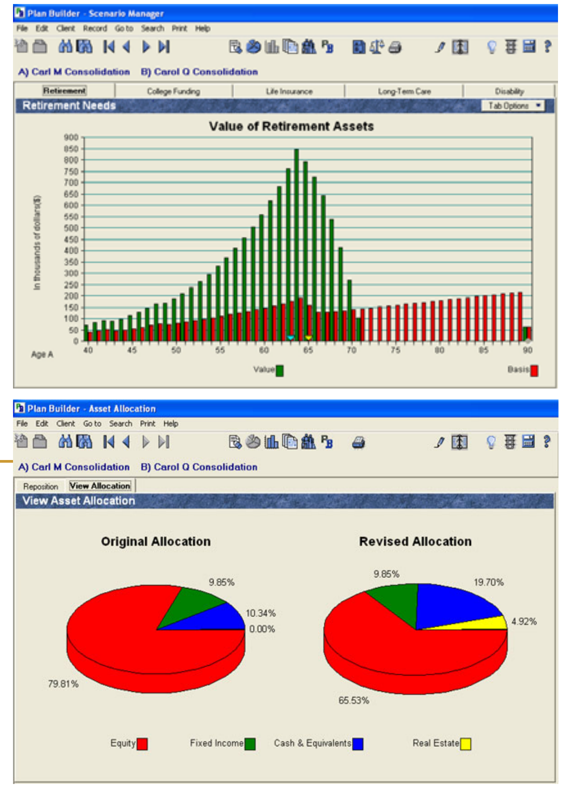
Product Overview

- Builder Suite provides Practice Management solutions — for Professional Financial Advisors. Surrounding the financial planning process with tools to improve your efficiency, from start to finish.

Serving Financial Advisors for 40 Years

Financial Planning Consultants, Inc.
www.FinancialSoftware.com
800 666 1656

Providing Innovative software, training and services to financial Professionals since 1969.



Plan Builder Scenario Manager

PlanBUILDER

Develop sophisticated, comprehensive financial plans quickly and easily. Make changes to more than 80 financial variables and immediately see results calculated and graphically displayed. This powerful tool motivates clients to take action NOW!

What makes Plan Builder Unique?

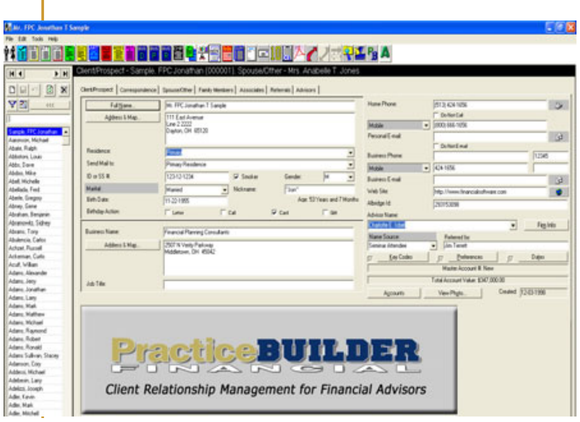
Scenario Manager – This powerful feature allows you to sit with a client and answer their “what-if questions” immediately, on the computer screen. This motivates the client to take action TODAY. No more setting another appointment so you can “run the numbers,” lose momentum and have to start all over again a week or two later.

Financial Notebook – An innovative and exclusive application for your clients and prospects use to gather their data. The program runs on their personal computer. This transfers the burden of data entry to the client while enhancing your image as a technically advanced professional advisor. They run the program in the privacy of their home securely on their computer and at a time that is convenient to them. A guided interview leads them through collecting personal information, assets, liabilities, income, and expenses. They can also attach notes and questions for your review anywhere in the program. When they have finished, they can send you an encrypted file. Five keystrokes later you have all the client’s data in Plan Builder ready to begin reviewing and analyzing.

PracticeBUILDER

Practice Builder is a complete CRM system, from your first reference to a prospect, through the introduction, the planning process, product sales and assets under management.

- Contact Manager – The interrelated database stores extensive information on both clients and prospects: all contact data, personal profile, preferences, spouse, children, professional advisors, account values and more. Practice Builder also incorporates a *Comprehensive ToDo System*, *Task Management, Appointment Calendar* and *Activity History*.



Client / Prospect Screen

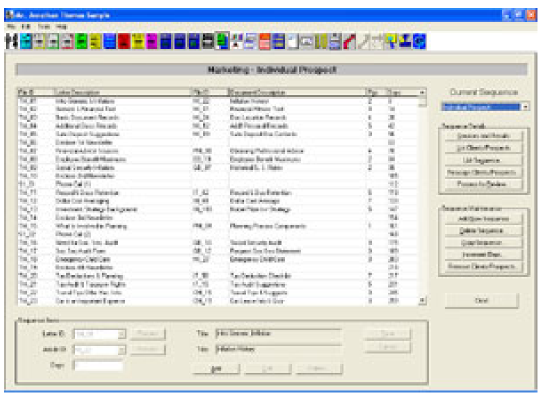
- Financial Planning Tools - Create a powerful first impression with: *Master Checklists* of personal financial planning techniques, assemble a powerful report with a Table of Contents that stimulates client action. *Summaries of Client Objectives*, the *Critical Assumptions* and *Investment Attitudes* confirm direction and reduce your professional liability.
- Resource Library - *Preformatted letters* and *Consumer* and *Advisor Focused Articles* for correspondence with prospects, clients, and other professional advisors. *Meeting Agendas* with pre-formatted *Interview Notes* for every client, prospect, business owner individual and group presentation.

ClientBUILDER

Client Builder is a presentation system for financial advisors that motivates the prospect to engage your services on your preferred basis. It is ideal for helping you charge a separate fee for the financial plan. A sample Plan Fee Schedule is included, ready for you to edit and use.

- Dramatize your prospect's immediate need for a comprehensive personal financial plan.
- Establish the basis for requiring your professional help to create this plan.
- Explain the steps in the personal financial planning process and why they need you.
- Provide a due diligence record of what you agreed to perform — and charge.
- Convey your offer of a 100% Satisfaction Assurance — to motivate a quick decision.
- Close the engagement of your services on a profitable Plan Fee plus commission basis.

Practice Management designed specifically for your business.



Automated Marketing

Practice Builder Marketing Module - Automate your marketing to prospects, centers of influence, media and your existing clients, with a fully automatic, turnkey nurturing system. *Qualify prospects* and retain clients with sequences for lead incubation and ongoing customer retention.

Sequences are furnished for your instant use and you can swiftly modify them for your unique client categories.

Documents – are printed out for your client or prospect based on the entries in the sequence for each marketing category. *Phone Scripts* will be printed for all persons scheduled to be called during that week.

Practice Builder allows you to define important characteristics that classify your clients and prospects and then implement Action Plans. Client Relationship Management is the solution to help you acquire new clients and strengthen existing client relationships.

Builder Suite has powerful tools that allow you to develop financial plans, get referrals, retain clients, maintain Top of Mind Awareness.

"Plan Builder is intuitive and easy to use. I love the traffic light checker that let's me know if I've forgotten some important detail. Plan Builder lets me create a concise, client-friendly proposal using great graphs to quickly illustrate problems and solutions. I have doubled my planning fees and doubled my life and annuity sales."
Dave Williams, FL

"Practice Builder is the single most important piece of software in terms of managing your business and client contact. Practice Builder has landed me over a million dollars in new money by touching prospects I would never have re-contacted without the software."
Steven G. Johnson, VA

PlanBUILDER FINANCIAL

Interactive, Real-time, Personal Financial Planning System

- FINRA Reviewed
- Develop high quality, colorful, comprehensive Financial Plans
- Create unlimited "what-if scenarios" - including Monte Carlo simulations
- Present product solutions powerfully, swiftly and dramatically
- Easily justify a substantial planning fee plus products sales

PracticeBUILDER FINANCIAL

Client Relationship Management Solutions for Financial Advisors

- Communicate more but with less effort
- Robust Contact Manager
- Prewritten letters, articles, agendas, fee schedules ready for your use
- Automated drip marketing engine
- Appointment and task scheduling calendar system

ClientBUILDER FINANCIAL

Presenting Your Financial Services to Prospects

- PowerPoint Presentation and Word files
- Customizable screens
- Scripted presentation ready to use or edit to use
- Structure for collecting fees from the start
- Sample Letters, Agendas, Checklists and Forms

Software, Training & Support for Financial Advisors

Financial Planning Consultants, Inc.
2507 North Verity Parkway
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Middletown, OH 45042-0430

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www.FinancialSoftware.com

Financial Planning Consultants - providing innovative software, training, practice management and marketing service to financial professionals since 1969.

The BUILDER Suite

SOFTWARE, TRAINING & SUPPORT FOR FINANCIAL ADVISORS

PlanBUILDER

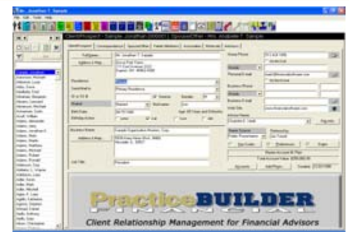
Interactive, Real-time, Personal Financial Planning System

- ☐ **FREE Demo** of Comprehensive Financial Planning Software
- Develop high quality comprehensive financial plans
- Create unlimited "what if" scenarios
- Present your solutions powerfully and swiftly
- Easily justify a substantial planning fee

PracticeBUILDER

Client Relationship Management Solutions for Financial Advisors

- ☐ **FREE Demo** of Client Relationship Management Software
- Communicate more Effectively
- Use Technology to build "Top of Mind Awareness"
- Increase High Caliber Referrals
- Convert Referrals into prospects and into clients



ClientBUILDER

Presenting Your Financial Services to Prospects

- ☐ **FREE Demo** of Presentation of Fee-Based Services
- Establish the basis for requiring your professional help to create this plan.
- Step by Step personal financial planning process and why they need you.
- Provide a due diligence record of what you agreed to perform — and charge.
- Close the engagement with a profitable Plan Fee plus commission basis.

Plan Builder	**$ 995**	______
Financial Notebook	**$ 245**	______
Practice Builder		
Single User	**$ 995**	
Advisor and Staff Version	**$1,495**	
Small Firm Version	**$1,995**	
Full Network Version	**$2,495**	______
Client Builder	**$ 795**	______
Shipping and Handling	**$ 15**	______
Subtotal		______
Ohio Delivery, 6.5% Tax		______
Total Due		______

Name ______________________ Company ______________________

Address ______________________ City, State, Zip ______________________

Phone ______________________ E-mail ______________________

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Method of Payment

☐ Check payable to Financial Planning Consultants, Inc.

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