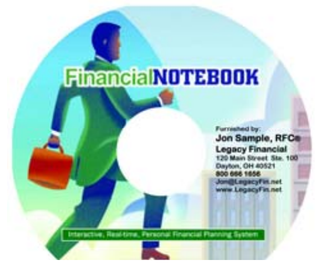
PlanBUILDER FINANCIAL

## ACCESSORIES

## FINANCIAL NOTEBOOK




Provide a cutting edge tool to your clients for data entry! Financial Notebook allows your clients to install a fully interactive, data gathering software program on their own personal PC. Then, in the convenience and privacy of their home, compile data necessary for your financial analysis and planning.

If you were an EnterAct or LifeGoals User, you already have Financial Notebook— for purchasers of Plan Builder it has been an optional add on. If you do not own the Financial Notebook, order it below.

No more lugging records into your office, no more data entry for you or your office staff. Your client can enter data 24/7, day or night—no need to wait for an appointment or office time. Issues or questions can be entered along with the data and there is a choice of entry formats. Clients choose either Form Entry or Interactive Prompts. When completed, a safe, secure, encrypted file can be saved to a disk or simply e-mailed directly to your office where transfer to Plan Builder software is a matter of only a few mouse clicks.

**Notebook** (Requires Plan Builder) **$245.00**

## Mass Produced, Fully Custom, Financial Notebook CDs

These mass produced CDs now available from Financial Planning Consultants are fully customized for your firm, personalized and labeled - ready to hand to your clients or prospects. Make them available at seminars, provide them as part of your drip marketing, or provide them one at a time upon signing a planning agreement. Use of Financial Notebook and these Custom CDs cements your advanced professional image, improves your efficiency and is appreciated by clients.

**Set-up** **$125.00**
**Each CD** **0.75**

### ORDER FORM
### FAX TO 513 424 5752 OR CALL 800 666 1656 EXT 13

Name: ______________________ Firm Name: ______________________

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Credit Card #: ______________________________ Exp: __________

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| ITEM | QUANTITY | SET-UP | PRICE EACH | TOTAL |
|---|---|---|---|---|
| FINANCIAL NOTEBOOK | ________ | N/A | $245.00 | ________ |
| FINANCIAL NOTEBOOK - CUSTOM CDs | ________ | $125.00 | $ 0.75 | ________ |
| MODERATE SAMPLE PLAN | ________ | N/A | $145.00 | ________ |
| SAMPLE PLAN – BINDER ONLY | | RFC EMBOSSED | PLAIN | |
| | ________ | $22.00 | $20.00 | ________ |
| AVERY TOC DIVIDERS (12 tab set) | ________ | N/A | $12.00 | ________ |
| | | | SHIPPING AND HANDLING | $15.00 |
| | | | SALES TAX (OHIO DELIVERIES ADD 6 ½ %) | ________ |
| | | | TOTAL | ________ |

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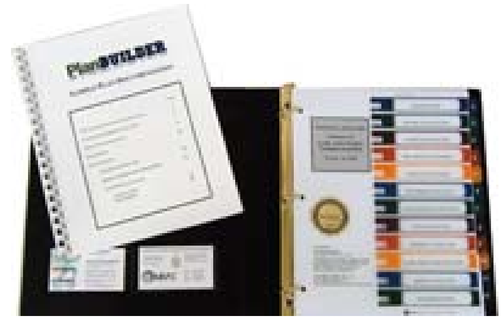
## SAMPLE PLANS - *Customized with your name and firm information*



### *Show and Tell for Financial Advisors*

**N**ow available from Financial Planning Consultants, Sample Plans can be an important aid to demonstrating your services, justifying your fees and closing more agreements. A Sample Plan allows you to more effectively **show** the product of your extensive services, illustrate the features and **reinforce** the benefits. Regardless of your fee—your goal is to show that the benefit to the client far exceeds the cost!

**I**f you are already providing a Sample Plan, this may provide a benchmark to evaluate your efforts. Sample Plans include the 30 page Sample Plan Documentation booklet that covers Planner's Justification, Using a Sample Plan, Case Narrative, and Cost/Benefit ratio Analysis.

**F**rom the Moderate Case narrative:
Rather than a treatise on how to do a perfect financial plan, the sample case is an example of finding solutions, and using Plan Builder to illustrate the moves that could help the client meet their financial goals. The hypothetical clients, Martin and Mary, are a young couple in their middle 40's with 1 child. They have inadequate cash reserves. They have no extra cash to invest for the future and they can only hope and pray that death or disability doesn't visit them.

**The goals of the case are:**

- Increase cash reserves
- Provide for College Education for children
- Meet Retirement goals
- Provide adequately for survivors

**The results of the plan are:**

- College Education funds repositioned and supplemented
- Retirement savings increased and repositioned
- 401(k) contribution increased
- Added Life Insurance: $150,000 – Martin
- No decrease in cash flow

## Sample Plans - $145

*Complete with Table of Contents tab dividers, comprehensive printed reports (>75 pages)*
*Moderate Case completely customized with your name and firm information*
*Deluxe Binder and Sample Plan Documentation*

Three Easy Ways to Order - Fax, call or e-mail - Allow two weeks for delivery

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