

# Financial Planning Consultants, Inc.

Financial Software Since 1975

Fax to: 513 424 5752

## Additional Products

### **PlanBUILDER**

powered by  
**EnterAct!**

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

\$1,121 \$ \_\_\_\_\_

### **PresentationBUILDER**

(a PowerPoint presentation)

Financial Planning presentation for use with individual prospects or in a group setting. (must be customized)

395 \$ \_\_\_\_\_

### **Qualified Prospect Names**

500 Names customized to your market, conditioned and ready for immediate import into Practice Builder Marketing

300 \$ \_\_\_\_\_

1,000 Names customized to your market, conditioned and ready for immediate import into Practice Builder Marketing

500 \$ \_\_\_\_\_

## Printed Materials

### **Personal Coaching Guide for Financial Advisors**

Guide to Personal Coaching written by Ed Morrow includes Supplement with over 60 financial coach profiles

14 \$ \_\_\_\_\_

### **Client Relationship Management for Financial Advisors**

Theory and reality of maintaining Top of Mind Awareness with clients and prospects using CRM interfaces. Need for multiple marketing sequences and action plans. Booklet and diskette

10 \$ \_\_\_\_\_

### **What's Your Competitive Advantage?**

Market Analysis recommendations and Action Plan tools for financial advisors. Booklet and diskette with spreadsheet and word files for revising your marketing plan

10 \$ \_\_\_\_\_

### **What is Your Time Worth?**

A cost analysis for financial advisors to help set fees and measure the value of personnel and services. Includes spreadsheets and personnel forms on diskette

10 \$ \_\_\_\_\_

Sub Total \$ \_\_\_\_\_

Shipping & Handling \$ 15.00

For Delivery in Ohio - Add Appropriate Sales Tax \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

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