

# Professional Financial Plan Service

Financial Planning Consultants is happy to announce a new service available to our valued clients and affiliate associations. We will do the planning legwork while you focus on spending your valuable time with clients. You will be able to concentrate on getting to know your clients and building trust.

We will create a personal financial plan that you will be proud to present to your client. Your plan will have your client's name and your firm information just as if you prepared it in your office. After our collaborative efforts, you will be able to explain shortfalls and problems and provide recommendations.

**You receive:**

- Plan complete with index, tab dividers, and attractive blue padded binder
- One hour web meeting to explain data entry
- Thirty minute web meeting to review plan and discuss recommendations
- Thirty minute web meeting to see how to use Plan Builder Scenario Manager to present the final plan

**Your duties:**

- Provide completed Plan Builder Standard Data Entry Form
- Take part in the web meetings
- Pay fee of \$750 or one-third of the plan fee, whichever is larger

**David M. Stitt, CLU, ChFC, CFP®, RFC®**



David will create the plan for you and conduct each web meeting. He has more than thirty years experience in the financial services industry and works with countless advisors helping them build comprehensive financial plans. Since the 1980s, David's experience includes the design, development, sales and support of two financial planning software programs. His unique experience coupled with your outstanding client relationships, will allow you to deliver more value to your clients with less effort.

You may choose to follow this path only for a few plans as you see how this service works and then start preparing your own plans - or you may find this the most efficient way to run your practice. We are sure the benefits of this new service will please you. E-mail David Stitt at David@financialsoftware.com or send us your completed order from today.

Estimated delivery time within two weeks after data confirmation. The Plan will be shipped via DHL Second Day.



## Professional Financial Plan Service

Price Each	Client Name
\$750	_____
or 1/3 of your planning fee	_____
	Subtotal _____
	Ohio residents add 6.5% _____
	2nd Day Shipping and Handling \$ 25.00 _____
	Total _____

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

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Card No. \_\_\_\_\_

Phone: \_\_\_\_\_ Expiration: \_\_\_\_\_

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

Your Signature: \_\_\_\_\_

Name: (Please print)

Visa  Master Card

Amex  Discover

Check written to: FPC

Date: \_\_\_\_\_

**CALL US AT: 800 666 1656**

**FAX TO: 513 424 5752 MAIL TO: FPC, Box 430, Middletown, OH 45042-0430**