Plan**BUILDER** FINANCIAL

The traditional approach to presenting a financial plan involves inputting data, analyzing reports and preparing a printed report for presentation to the client. Most software programs also provide colorful graphs and charts to accompany the text and numbers because a picture is worth a thousand words.

Plan Builder, the evolution of **EnterAct, LGX** and **LifeGoals,** powered by **CCH** tax research, takes planning to the next level, getting the client involved in a moving picture. **Plan Builder** was designed to be used effectively with the client viewing it at the same time and interacting with you and the software to solve their problems.

Using **Plan Builder** you can show clients, in real-time, the answers to their "what-if" questions. This means you can motivate them to take action **today**. No longer will you need to set a later appointment after you have had time to "re-run the numbers" at which time you will need to spend time getting them re-energized to solve their problem(s). With **Plan Builder** you can be more productive and serve your clientele more efficiently.

Plan**BUILDER**

Plan Builder helps you develop comprehensive financial plans, quickly and easily. Create unlimited "what-if" scenarios - including Monte Carlo simulations - then illustrate your plans in real time with colorful charts and graphs. **Plan Builder***'s* compelling, easy-to-understand presentation helps your clients see the wisdom of your plans immediately.

$995 $_____

Financial Notebook
Requires Plan Builder

A revolutionary, new data-gathering, add-on for **Plan Builder**. Clients fill in their own data electronically, reducing tedious data entry on your part. Helpful prompts yield more accurate information, so you spend more quality time with your clients.

$245 $_____

Complete: PlanBUILDER *with* **Financial Notebook** $1,195 $_____

Sub Total $_____

Shipping and Handling $ 15.00

For Delivery in Ohio – Add Appropriate Sales Tax $_____

Total $_____

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