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FINANCIAL NOTEBOOK - CUSTOM CDs	_____	\$125.00	\$ 0.75	_____
MODERATE SAMPLE PLAN	_____	N/A	\$145.00	_____
SAMPLE PLAN – BINDER ONLY	_____	RFC EMBOSSED \$24.00	PLAIN \$ 24.00	_____
AVERY TOC DIVIDERS (12 TAB SET) ONLY	_____	N/A	\$ 15.00	_____
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SAMPLE PLANS

Show and Tell for Financial Advisors

Now 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!



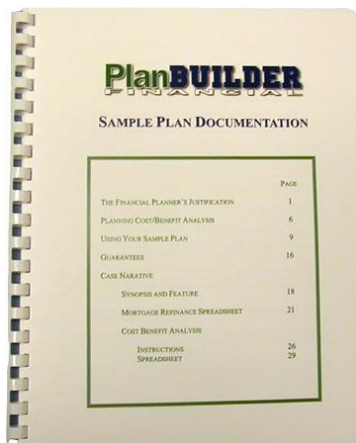
If you are already providing a Sample Plan, this may provide a benchmark to evaluate your efforts. Sample Plans include the 30 page Sample Plan Documentation booklet that covers Planner's Justification, Using a Sample Plan, Case Narrative, and Cost/Benefit ratio Analysis.

The first Sample Case, available now, is the Martin and Mary Moderate Case.

From the Moderate Case narrative:

The Martin and Mary Moderate sample case is for a couple in their 40's with one child for whom they plan college funding. Both clients work, Martin has a 401k and Mary has an IRA started recently after her return to the workplace following staying with their son until he was ready for school.

The case is not a treatise on how to do a perfect financial plan. It is an example of finding solutions, and using Plan Builder to picture the moves that could help the client meet their financial goals.



The goals of the case are:

- Provide for College Education for children
- Meet Retirement goals
- Provide adequately for survivors

The results of the plan are:

- College Education savings increased by \$ 70 per month and invested at 9%
- Mutual Fund added to Retirement investments, \$ 250 monthly
- 401(k) contribution increased \$180/ month (2%) + 1% match
- Increase Mary's IRA contribution to \$325/ month
- Added Life Insurance: \$150,000 – Martin
- No decrease in cash flow

Sample Plans

\$145

*Complete with index tab dividers, comprehensive printed reports (100 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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