

# Financial Planning Consultants, Inc.

Financial Software Since 1975

## The **BUILDER** Suite

### Additional Products

#### **PlanBUILDER**

The evolution of EnterAct, LGX and LifeGoals, powered by CCH tax research.

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!

\$1,195 \$ \_\_\_\_\_

#### **ClientBUILDER**

Presenting Financial Services to Prospects

Financial Planning presentation system for financial advisors that motivates the prospect to engage your services on your preferred basis.

\$795 \$ \_\_\_\_\_

#### **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 and Handling \$ 15.00

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

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

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

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

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

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Credit Card #: \_\_\_\_\_ Exp: \_\_\_\_\_

*American Express/Discover/Master Card /Visa*

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

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**Fax to: 513 424 5752**