



Partner Page:



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## **MoneyGuidePro**

MoneyGuidePro (MGP) is a client-centered Financial Planning system for Goal Planning, Insurance Needs Analysis, Asset Allocation, and Estate Planning.

MoneyGuidePro is the leading web-based software for sophisticated goal-based planning. It is intuitive and easy to use, while still providing sophisticated analyses and results. MGP features on-line collaborative planning between advisors and clients.

## **12 Key Features**

### **What If Worksheet**

The What If Worksheet in MGP is smart, fast and easy to use for creating multiple flexible scenarios.

### **Super Solve Button**

This is the "Easy Button" for Financial Advisors. It has three major benefits:

1. It will save you time and effort by eliminating the frustrating task of trial-and-error plan creation;
2. It will give you confidence that your recommended plan will be satisfactory to your client ;
3. It can allow Advisors who are less experienced in financial planning to create better, professional-quality plans.

### **Aggregate - Integrate**

MoneyGuidePro offers CashEdgePro as an optional add-on product (at extra charge) to provide full Account Aggregation capabilities:

- allows your clients to create links to all their online accounts;
- automatically transfers current account values into your MGP Plan.

Plus, MGP integrates with most of your other favorite core applications.

### **Goal Wizard**

The client's story should always start with their Goals. The full and complete identification of each client's unique Financial Goals is the most important step in the creation of a successful plan. So for something so important, you need to see the Goal Wizard.

### **Guest Sharing**

MGP takes advantage of the unique capabilities of the internet to expand and enhance how you can work with your clients. Through the Guest Sharing feature, it makes it easy to work with clients online, anywhere, anytime.

### **Details**

You want Plan Details - MoneyGuidePro has them . MGP provides a wide range of detailed reports that are easily accessed online or printed as part of a report.

### **Smart Presentation**

You craft a brilliant plan for your clients. Now, you must explain it, and convince them to take action. SMART Presentation makes it easy, by automatically converting your recommended plan into a five-step interactive, PowerPoint®-like presentation.



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**MONEYGUIDEPRO™**  
Financial Planning **SMARTware**

### **MGP - My Way**

Just like Frank Sinatra, most Advisors like to "do it my way." The User Options feature of MGP lets you configure the system to suit you, and how you like to plan.

### **Power Features**

- Use MGP Standard Classes and Portfolios
- Create your own Classes and Portfolios
- Custom Portfolios
- Portfolio Optimization
- Tax and Inflation Overrides
- Stock Options
- Restricted Stock
- NUA
- 72(t) Distribution

### **Budget**

For clients who need help freeing up money for additional savings, MGP has a Budget Module.

### **Life - LTC - Disability - Estate**

MGP provides fully-integrated modules for Insurance and Estate Analysis. Each is designed to be used at two levels:

1. One Click - After completing a Financial Goal Plan, clicking one more link will provide an excellent, first-level analysis for Life, LTC, Disability or Estate without any more data entry.
2. Advanced - For each module, the user can choose to refine the analysis by providing additional information.

### **Asset Allocation**

MoneyGuidePro includes a robust set of Asset Allocation capabilities. It can be used both within a Financial Goal Plan and as a separate module.

### **Special Pricing for Preferred Partner – \$995 per year per producing Rep**

Includes the following:

- All MoneyGuidePro modules
- Free phone and email support
- Free on-line training - both live and recorded
- Free upgrades during your subscription
- Option to renew at same price for a second year

### **Integration Partners Popular with VSR Reps:**

- Albridge Wealth Management
- E-Z Data
- IPS Advisor Pro
- Junxure-i
- Morningstar
- Redtail
- Upswing