

## Financial Goals and Investment Analysis Solution to Close More Business and Build Long-term Trust

From simple investment planning to saving enough money for retirement or education expenses, clients have many goals, objectives, and dreams. With Financial Compass, your financial advisors can be certain they are providing clearly understood and appropriate guidance tailored to meet the individual needs of their clients.

**Financial Compass** is a goals-based, needs analysis application that enables financial advisors and insurance professionals to quickly evaluate their client's financial situation. High-quality, easy-to-understand presentations support recommendations and position appropriate investment and insurance products to close more business.

Offering a highly intuitive, step-by-step interface, Financial Compass is designed for ease of use, allowing advisors to quickly produce an actionable investment or financial analysis in a few simple steps. Whether an advisor is looking to create a single goal presentation or analyze multiple client needs, Financial Compass offers seven sales-oriented modules that address many common financial needs.

- Asset Allocation / Investment Planning
- Retirement Funding
- Education Funding
- Event Funding
- Life Insurance
- Disability Income
- Long-Term Care

## Action-Oriented Financial Analyses

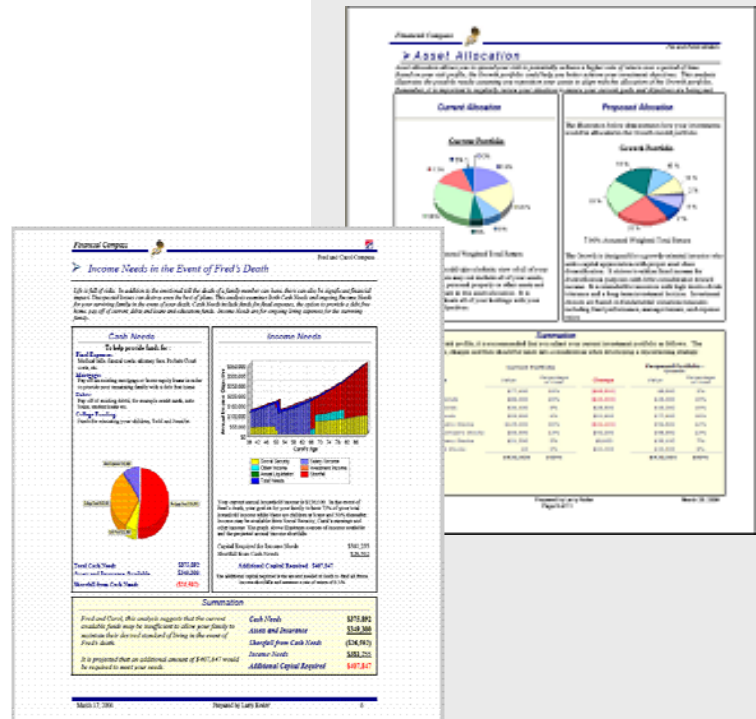
Allowing advisors to quickly create plans in as little as five minutes, this easy-to-use solution provides the necessary tools to quickly create analyses that drive clients to take action and help address their most important financial needs.

## Persuasive, Compelling Presentations

Financial Compass presents each financial situation using the perfect blend of analysis and graphics to illustrate, educate and motivate clients to action. Tailored, compelling presentations are designed to build greater confidence and trust to help close more business.

## BENEFITS

- Intuitive, easy-to-use application allows advisors to create plans in as little as 5 minutes
- Sales-oriented modules help advisors focus on specific client investment and insurance needs to close more business
- Clear, compelling client reports are designed to foster greater client interaction and understanding
- Customer profiling and data gathering is fully integrated and shared by all modules eliminating information redundancy
- Integration framework to facilitate data sharing with other third-party systems, including CRM, data aggregation, trading platform and portfolio management tools



Financial Compass supports a wide variety of prospecting, planning and sales needs to help financial advisors acquire and retain long-term client relationships. This powerful application is uniquely designed to assist professionals selling life, disability and LTC insurance, college savings and other investment products. Financial Compass offers everything needed to create compelling, action-oriented sales presentations for virtually any opportunity.

- Quick and easy to use
- Compelling sales-oriented reports
- Minimal data entry
- Step-by-step workflow

**Beyond Simple – It’s Obvious!**



## Key Features

- Scripted and graphical user interface for quick and easy plan creation
- Seven core planning modules to choose from:
  - ✓ Asset Allocation / Investment Planning
  - ✓ Retirement Funding
  - ✓ Education Funding
  - ✓ Accumulation Funding
  - ✓ Life Insurance
  - ✓ Disability Income
  - ✓ Long-Term Care
- Matching Fact Finder simplifies customer profiling and data gathering
- Detailed on-screen results provide immediate impact of plan modifications and different scenarios
- Highly flexible report builder allows advisors to select which report sections and information to include in the final client report

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