Financial Planning Tools

Financial Planning Tools uses the same interface as our popular TaxTools program, offering the same powerful integration of planning modules and client data, but geared towards the financial planner/ advisor.

Financial Planning Tools includes a comprehensive Financial Planner module as well as over one hundred forms, worksheets, flowcharts, and calculators.

Highlights

- Bar charts, graphs and pie charts can be printed in color
- Imports clients and preparers from other CFS programs
- Inflation factor built into worksheets and calculators
- Instructional video guides the user through the many features
- Includes sample client with data
- As with all programs, backed by a 30-day money-back guarantee and free tech support

New for 2011

- Updated for latest tax law changes

2-for-$550 special

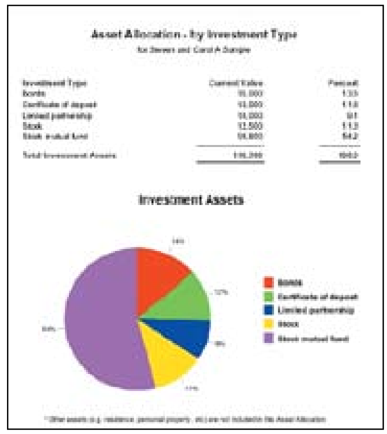
Buy two years of Financial Planning Tools for $550, (a savings of almost $100).

Forms

- Financial Consulting and Planning Agreements
- Form ADV
- DE-4
- SSA-7004
- U-4
- W-4V
- W-9
- 709, 709-A
- ...and more!

Financial Planner

- State goals and objectives
- Summarize current net worth
- Show asset allocation by investment type and asset category
- Project living expenses adjusted for inflation
- Automatically sell assets to balance cash flow needs
- ...and more!



Financial Calculators

- How Much do I Need to Save For Retirement?
- Retirement Income Projection
- How Much Will P/T Work During Ret. Reduce Savings
- What Rate of Return Must You Achieve?
- Bi-Weekly Mortgage Conversion
- Can You Afford This Loan?
- How Large Can Your Loan Be?
- ...and more!

Reports

- Net Worth Summary
- Goals and Objectives
- Asset Allocation
- Retirement Planning Considerations
- Long-Term Cash Flow
- Survivor Needs Analysis
- Disability Needs Analysis
- Long-term Care Planning Considerations
- ...and more!

Utilities

- Bi-Weekly Mortgage Conversion
- Comparison of 10, 15, 20, and 30 Year Mortgages
- IRA Inheritance Options Flowchart
- Office in Home Flowchart
- How Much Life Insurance is Needed?
- How Can You Reach Your Investment Goal?
- ...and more!

First-Time User
$349

Annual Renewal
$299

Network Upgrade
add $100

Financial Planning Tools is licensed through May 31st of the year following the release date and is not usable after that date.

(800) 343-1157 **WWW.TAXTOOLS.COM**