

“PlannerPortal”

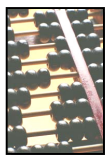
subscription-based financial sales presentations



PlannerPortal Online Solutions for Financial Advisors

PlannerPortal is a browser-based, interactive, database-driven set of financial planning and sales presentation tools designed to meet a wide variety of prospecting, planning and sales needs. The PlannerPortal offers detailed needs analysis, powerful sales presentations, concept-oriented calculators, a growing library of financial articles, and much more. It's everything your agents need to create compelling sales presentations for virtually any opportunity.

- **Advisor Needs Analysis Tools:** A dozen detailed needs analysis modules which generate educational, eight to twelve page informative reports (PDF format).
- **AdvisorConcepts:** Client specific one-page presentation tools including calculators and flowcharts covering a broad variety of financial topics and products.
- **ConsumerConcepts Calculators:** Over 100 online calculators. These calculators give quick answers to everyday client questions and concerns.
- **AdvisorLibrary:** A growing library of online financial articles. Each is a single page in length and can be customized to include advisor and client information.



subscription service

html-based data input

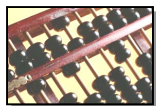
relational database

professional pdf reports

Comprehensive

PlannerPortal gives the agent the ability to analyze diverse, complex financial concepts and clearly communicate alternatives and solutions. It provides literally hundreds of sales piece, covering virtually every topic you can imagine.

- College Planning
- Credit & Debt
- Home & Mortgage
- Income Taxation
- Insurance
- Budgeting and Cash Flow
- Paycheck & Benefits
- Qualified Plans
- Retirement Planning
- Saving Goals & Returns



ASP Distribution Model

Our ASP distribution model provides up-to-date, use-anywhere systems for dramatic cost savings and simplified administration.

- Full data integration
- Automatic system updates
- Detailed modular planning
- System admin and mgmt. tools
- Standalone presentation pages
- ASP hosting and data storage
- Web-based, “use anywhere” advisor access

Customizable

PlannerPortal can be customized on either an institutional or advisor level. Institutions may create branding, marketing and linking opportunities which will be seen by all of their reps. PlannerPortal can also be customized to incorporate additional features and systems provided by third parties.

Cost Effective

Everything you need to provide your field force with exceptional tools and technology at fixed or variable pricing, depending on your needs.

Financial Calculators, Inc.

Online Analytical & Presentation Tools for Financial Institutions and Professionals

www.FinancialCalculators.com

(801) 756-8127

Sales@FinCalc.com