eMoney **Planning Tools** Agenda

This class is designed for **360-Pro** users who want to gain an understanding of the **Advanced Planning Tool**. You will leave the class with knowledge of the system's comprehensive planning capabilities.

8:15 **Breakfast, Introductions, Goals, and Overview**

8:30 **Advisor Dashboard - So you logged in... now what?**

Sharing Rules - Share your client list with other users in your office.

Resources - Create Fact Finder templates and learn about PSG & Mimeo.

Advisor Reports - Discover opportunities in the system.

Which Tool - Decide the best tool to use.

Advanced Planning Tool - The Fact Finder

Logical Approach - The efficient steps to follow when entering data.

Cash Flow Adjustment - Learn to modify income, expenses, simulation adjustment, transfer flows, goals vs. expenses.

My Info - Set defaults in the system.

Break

Advanced Planning Tool- The Fact Finder (Continued)

Assumptions - Learn how to change the miscellaneous assumptions.

Model Portfolios - Create your own growth portfolios.

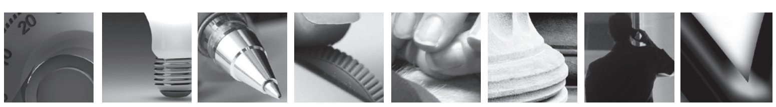
Core Cash Basics - Learn about the core cash account and simulation.

Advanced Planning Tool - Reports

Verify Data - Learn the best reports to use when confirming data input.

Common Reports - Discover popular reports and when to use them.

Drill down and Comparisons - Change parameters and dial down into reports.



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12:00 — **Lunch - Let's eat!**

1:00 — **Advanced Planning Tool - Analyze Overview**

- **Building a Plan** - Customize plans to demonstrate your client's unique situations.
- **Adding a What If** - Learn why and when to use each scenario.
- **Techniques** - Add, update, or remove items to create circumstances.

Advanced Planning Tool - Present Overview

- **Adding Pages and Chapters** - Build a presentation to illustrate your plan.
- **Configuring Pages** - Adjust report pages to show alternate scenarios and what-ifs.
- **Templates** - Streamline the process.

Case Study: Build a Retirement scenario in Analyze

- **New Blank Plan** - Create a theoretical retirement plan.
- **What-if's** - Add a What-if to stress test the plan.
- **Copy Plan** - Demonstrate alterations or proposed ideas.

Break

Case Study: How do you want to tell the Retirement story in Present

- **Build Your Presentation** - Add and adjusting pages and chapters.
- **Choosing scenarios** - Compare reports to tell your story.
- **Ideas for Presenting** - Best practices on presenting to clients.

4:00 — **Questions and Answers / Wrap Up**

eMoney Advisor