



Objectives

This class is designed to teach you how to use the Tools feature in order to determine opportunities. You will leave the class knowing how to illustrate financial proposals using the eMoney system.

10:00-10:15 Introduction and Goals

10:15-11:15 Module 1 Investment Planning Tool

Develop new ways to analyze investments.

- Investment Proposal
- Investment Policy
- Investment Grouping
- Portfolio Analysis Center
- Monte Carlo
- Investment Reports

11:15-12:00 Module 2 Financial Concepts Tool

Develop ways to illustrate financial strategies.

- Risk Advantaged Portfolio
- Life Insurance Advantage
- Wealth Diversification Advantage

12:00-12:30 Lunch

12:00-1:00 Module 3 Needs Analysis Tool

Goal based planning options.

- Create
- Fact Finder
- Analyze-Active Pages
- Present
- Follow Up

1:00-1:45 Module 4 Retirement Income Tool

Review the cash flow driven retirement planning tool.

- Fact Finder
- Analyze-Active Pages
- Present

1:45-2:00 Break

2:00-3:00 Module 5 Next Steps

Understanding the Next Steps tab.

- Client site
- Vault
- Alerts
- Alliance Partners
- Mobile Access