

Advisers – Give Affordable Scaled Advice and be a Financial Lifestyle Coach

Full Service advice is unaffordable for most, and scaled advice won't be economic for the adviser with the traditional structured practice. The new adviser should become a coach and source of reassurance for clients, assisting them to achieve their individual goals. Advice based on lifestyle events, or reassurance that the client is on track to achieve milestones, is the main focus of the younger age group clients. They are tech savvy and will seek a lot of information on line. They want accessible, affordable, human interaction.

Until now, supplying scaled advice economically has been the problem.

Financial Mappers Pro is dynamic cash flow modelling software. Once a client's data, goals and lifestyle events have been entered, immediate informational reports are available for client assessment. Demonstration and modelling are visual and dynamic, and an SOA is produced quickly.

Two quotes about Fintechs from *The FPA White Paper 2017*

Clients across the age spectrums value digital financial planning tools that offer education, information, together with modelling tools, that can be used by the potential investor to explore and define parameters of their own situation before engaging a financial planner.

The ultimate in co-planning is to supply each client access to “*cloud-based client shared software*” for a limited time or plan length via a *Financial Mappers Pro*^{Connect} account. The client can remotely model changes, generate reports and connect with adviser.

Efficiency in the advice process is the “Holy Grail” of Financial Planning.

Establishing a financially successful mentoring practice is easy with *Financial Mappers Pro* and adding the optional *Pro*^{Connect} feature selectively.

To find how to improve your client engagement and practice efficiency, watch our **Demonstration Video** and then register for a **30-Day Free Trial**.

Watch Demo