

## Client Shared Cash flow modelling software brings efficiency to Tax and SMSF Accountants

---

Be time efficient by having your client present with reports detailing all their finances, cash flows and future investments over the next 5-years. You could instantly spot where your tax and general advice would help your client. For the accountant, licensed to give limited or SMSF advice, Financial Mappers Pro, allows demonstration and optimisation of your strategies quickly. You can generate your **SMSF Investment Strategy** and **Statement of Advice (SOA)**.

You could simply refer your clients to purchase Financial Mappers to do their own modelling and present with their reports at the review meeting. As a Referral Partner, your client can purchase Financial Mappers at a discounted price.

White-labelled Financial Mappers Pro for accountants' use, allows servicing of any number of clients.

The optional *Pro*<sup>Connect</sup> feature, for selected clients, allows your client to create a plan and share that plan and reports with you. This allows remote servicing and co-planning.

The Self-Managed Superannuation Fund is an integrated part of the client's financial model. For example, it clearly shows when an SMSF owned property may need to be sold to fund the client's drawdown, as well as the tax implications. Either the accountant or client could write the information required for the **SMSF Investment Strategy**. With the Report Writer, you can easily customize and deliver an **SOA** where advice is given. It's that simple.

For your clients involved with real estate, *Financial Mappers* displays estimated future expenses and interest costs as well as "brush-stroke" tax implications. This simplifies your initial tax strategy discussion.

*Financial Mappers Pro* is ideal for efficiency in a multi-disciplinary practice, where the client's plan information and functionality may be shared by adviser, broker and accountant.

To add value for your client and improve practice efficiency, watch our **Demonstration Video** and then register for a **30-Day Free Trial**.

Watch Demo

Referral  
Partner