

How Excel Users can Seamlessly Transition to an Advanced Advisory Practice

To meet modern client demands, you know you can't hang on to old faithful **Excel** forever. With *Financial Mappers Pro* you can be up to speed with advanced modelling software in a day. Watch our **Demonstration Video** and try it with a few clients during the **30-day trial period**, then easily transfer existing clients when comfortable.

Your younger generation clients want a different experience and your older client base may be dwindling. Is your income under threat or your practice costs rising? Perhaps you have for too long been avoiding the practice disruption of learning new technologies and then finding they don't always fit, or don't do exactly what you want, or are too expensive? Are you daunted by the plethora of the ever-increasing technology offerings?

Modern practice is not suited to having one massive platform doing everything. The new model is to choose "**Best in Breed**" tools which fit like modules. Some tools may have just one primary function, but some are useful tools across several categories. *Financial Mappers Pro* is one of the latter tools. It is very easy to learn and use. This cash-flow modelling and planning tool is also an excellent demonstration tool for client meetings.

Financial Mappers Pro will turn you into a modern efficient client friendly practitioner. When comfortable, you can add one suitable client at a time to the optional Pro^{Connect} feature, giving your client cloud-based sharing of plans, and use of the software. You will then be at the front end of the technology race.

Don't be sceptical - it is that easy to modernize - the process is not difficult to learn- there is no practice disruption.

The software was initially conceived for consumer use so you will require little training apart from watching our set of demonstration videos, if you wish. Assistance is available for any questions.

To bring you comfort, the unseen belly of *Financial Mappers Pro* commenced as 100+ Excel spreadsheets all interlinked. That master mathematical model is used to test the algorithms of the *Financial Mappers'* database. This dynamic cash flow modelling software means any one change alters the outcome for everything affected by that change.

Once client data and goals are entered via CSV files from Excel, you can view various report types from short to comprehensive. Extensive modelling tools enable you to demonstrate options to reach goals in graphic or numerical formats. Modelling of "What If" scenarios" to your client is instantaneous – answer any questions on the spot. You can demonstrate asset allocations, risk profiles, insurance needs, how assets such as property may be bought and sold to achieve maximum tax advantage or have the Australian means-tested age pension included once the client is eligible. All you have to do is choose the recommendations for your client and check to see if you are still on track to reach the client's goals. Our inbuilt report writer allows you to customize an SOA to your preference and produce quickly within the software.

When you feel comfortable, it's even easier to proceed to the next step - adding one tech savvy client at a time to the optional Pro^{Connect} feature. This enables servicing remote clients,

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giving scaled advice and co-planning with engaged clients. This feature could help you find new clients who currently can't be serviced.

Take the step to be proficient in using cutting edge cloud-based Client Shared Software.

This will take client engagement, and your practice to the next level.

So there you go, from being a technology Luddite to having a very advanced, efficient practice in one easy step.

To transform your practice, watch our **Demonstration Video** and then register for a **30-Day Free Trial**.

Watch Demo