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

Financial Mappers PRO

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*Connect 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

FinancialMappers®

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Financial Mappers LITE

Maintain your Clients

Research is showing that clients expect digital tools from their service providers. Imagine how popular you will be if you can give your client a digital tool which allows them to create a 5-year Savings/Investment Plan which includes all their personal, investment and retirement income and expenses.

Financial Mappers Lite is a white labelled tool you can provide, to your client free for the first 12-months. Thereafter, if your client wants to maintain an annual subscription, they can pay a small annual service fee.

Understand all your Client's Cash Flows

Your client can create a 5-Year Savings Plan and generate a Financial Report which you have customised to give you the cash-flow information you require. This will speed up the process of understanding your client's needs and how your recommendations for tax effective planning can be implemented.

You don't need to learn any more software or use a different CRM. Simply ask the client to do the work for you.

Find Out More

Referral Partner

Financial Mappers LITE is limited to a 5-Year Savings Plan. You may have clients who want to do more detailed planning. DIY Investors can purchase *Financial Mappers* (single use version) from the website.

If you would like to recommend this product, you can be a Referral Partner so our client's receive a 20% discounted to the recommended price.

Referral Partner

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