

# Money Tree Software Professional Financial Planning Software Workshops



**Orlando, June 18<sup>th</sup> - San Antonio, Sept. 28<sup>th</sup> - Seattle, Oct. 26<sup>th</sup>**

## **8:30 Software Overview and Introduction:**

*See how the right software increases efficiency, confidence & profitability.*

- Experience, history and philosophy behind Money Tree Software
- Product overview and feature summary
- How to select the right report set for your client

## **9:00 New Developments**

- New products and services offered by Money Tree Software
- A quick look at what's on the horizon

## **9:30 Silver Financial Planner and Silver Online**

- Basic application introduction, functions and operation
- Preparing clear financial plans in minutes, an economical and effective planning system
- Demonstration of the powerful "What-If?" retirement graph system
- Introduction to the new "When-If?" behavioral analysis system
- Silver Online – planning from anywhere, with client access to reports and data

## **10:45 Morning break**

## **11:00 TOTAL Planning Suite – Getting Started**

- Basic application introduction
- Database structure and client records management
- Menu and general operating tutorial

## **12:00 Lunch & Networking:** *Lunch and breaks included with registration.*

## **12:45 TOTAL Planning Suite - Creating the Plan**

- Data collection, "Quick Input" and "Secure Online Planning Survey"
- Entering contact and financial data, modeling complex situations, downloading data
- Adding complete planning flexibility with Age Change Event Tables

## **2:30 Afternoon break**

## **2:45 TOTAL Planning Suite – Reviewing and Presenting Reports**

- Reports – viewing, printing, analysis & audit trail
- Easy Money: *Goal Based Planning*
- Golden Years: *Cash Flow Based Planning*
- Distribution Solutions: *Reports for RMD, 72(t), Roth conversion, and more.*

## **4:15 Summary**

- Using Money Tree Software to increase your productivity
- Costs and benefits of planning & presentation options
- Questions, Answers and Group Discussion

## **4:45 Conclusion & Casual Discussion**

## Professional Financial Planning Software Workshop Registration



The key developers at Money Tree Software provide an expert overview of financial planning software, and how each work with different planners' practices. You'll learn how to determine which applications are best for each client and how implementing them into your business can increase your revenue. Get updates on enhancements and advanced features. Learn to use your software with more confidence and increased profitability. Get all your questions answered by a planning expert.

**Who Should Attend?** Sessions are great for professionals now using Money Tree applications, as well as planners evaluating new financial planning software. Learn about the many new and advanced features in both Silver and TOTAL Planning Suite. See the new Silver On-Line and other web based systems. If you want to know about the best planning software for your practice, you're encouraged to attend.

**Price:** \$150 includes lunch, snacks and refreshments

**Cancellation Policy:** Cancellation 14 days or more prior to the class: refund of \$100  
Cancellation less than 14 days prior to the class: refund of \$75

**Time:** Workshops begin at 8:30 a.m. and conclude at 4:45 (Break and ending times are estimates)

### How to Register:

1. Fax this form to 541-738-6522 – or -
2. Call us toll free, 877-421-9815 - or -
3. Email your registration information to [support@moneytree.com](mailto:support@moneytree.com)

Financial professionals from all over the country tell us these workshops are very valuable. Advisors learn from the questions and discussions with other working professionals. These workshops always produce lively and interesting group interaction. Money Tree users are some of best planners anywhere. Come join in the discussion of practical professional planning.

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| <input type="checkbox"/> Orlando, FL     | Monday, June 18  |
| <input type="checkbox"/> San Antonio, TX | Friday, Sept. 28 |
| <input type="checkbox"/> Seattle, WA     | Friday, Oct. 26  |

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Payment:  MasterCard  VISA  Discover  American Express  Check attached

Card number \_\_\_\_\_ Exp date \_\_\_\_\_ Security code \_\_\_\_\_

Name on Card \_\_\_\_\_

**Confirmation and hotel information will be sent upon receipt of registration.**