



# In-Depth Financial Planning Software Workshop Agenda

## 2013 Workshop Locations

- Salt Lake, Friday April 5<sup>th</sup>
- Denver, Friday June 7<sup>th</sup>
- Orlando, Friday Oct. 18<sup>th</sup>

In conjunction with FPA Experience in  
Orlando, FL October 19-21

### 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 "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 and audit trail
- Easy Money: *Goal Based Planning*
- Golden Years: *Cash Flow Based Planning*

### 4:15 Summary

- Using Money Tree Software to increase your productivity
- Costs and benefits of planning and presentation options
- Questions, answers and group discussion

### 4:45 Conclusion & Casual Discussion



# In-Depth Financial Planning Software Workshop Registration

Key developers of 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 currently using Money Tree applications, as well as planners evaluating new financial planning software. Learn about new and advanced features in both Silver and TOTAL Planning Suite. 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. The 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.

**Select Location:**     Salt Lake City, UT     Denver, CO     Orlando, FL

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.**

Make checks payable to: Money Tree Software

Mailing address: 2430 NW Professional Dr. Corvallis OR, 97330