Silver Financial Planner

Fundamental Planning: Clear, Fast & Effective

MONEY TREE SOFTWARE™

Silver Financial Planner delivers EFFICIENT planning for busy planners. Silver's intuitive navigation and clear, concise reports allows you to spend less time creating plans and more time where it matters most, with your clients. The interactive "What-if?" allows for client interaction by offering instant graphic analysis of plan modifications.

Planning Topics:	*Summary* *(maximum reports pages = 65)*
Net Worth	Current Year
Investment	Asset Worksheet
	Current & Suggested Asset Allocation
	Asset Projection by Taxation Type
	Educational reports covering: Asset allocation, market risk & diversification, investment returns & power of compounding
Cash Flow	Yearly Cash Flow Numbers
	Cash Flow Graph
Goal Evaluation	Set priorities levels for each goal
Retirement	Retirement Capital Analysis
	Retirement Summary
	Shortage Solutions
	Retirement Expense Summary
	Monte Carlo with 10,000 Trials & Fat Tail Option
	What-If? Modeling
	When-If? Dynamic Behavioral Analysis with Variable Retirement Ages & Spending
Insurance	Insurance Summary
	Survivor Needs Analysis (current needs)
	Survivor Needs Calculation (current needs)
	Disability Insurance (current needs)
	Long-Term Care (5 years of care)
Estate	Current Situation
	Net Worth Statement
	Current Flowchart & Estimate
	Alternative Structure Flowchart & Estimate
	5 Year Future Estate Tax Estimate
Education	College Cost Estimate
	Funding Illustration
	Education Funding Solutions
Debt	Current & Proposed Plan
	Monthly Payment Schedule
	Accelerated Wealth Accumulation
	Debt Education

Data Input:	*Summary*
Names/Ages	Names, birth date, retirement age, life expectancy, marital status, address, employment, notes
Risk	Risk tolerance information
Estate	Estate detail information
Insurance	Life insurance information
Pension/S.S.	Pension benefits and Social Security benefits
Income/Expense	Income needed, special income or expense items, etc.
Education Funding	Education funding information for dependent children , college cost estimator
Assets	Savings and investments, retirement accounts, 4 taxation types, up to 12 asset classes
Additional Assets/Debts	Personal assets and debts for net worth
Debt Freedom	Debt payment information for Debt Freedom Analysis
Rates	Before & after retirement rates of return per taxation type, Inflation rates, effective tax rates, and asset deposits increase rates