In-Depth Financial Planning Software
Workshop Agenda

2014 Workshop Locations

- **Seattle, WA**
  Friday, September 19th
  (Prior to the FPA's Annual Conference)
- *Other 2014 locations to be announced…*

Morning Session (8:30 am - 12:00 pm)

Silver Financial Planner

Operation and Workflow

- Experience, history and philosophy behind Silver Financial Planner
- Using Silver effectively and learning best practices

Special Features

- Demonstration of the "What If?" retirement graph system
- Introduction to the "When If?" behavioral analysis system
- Fat-tail Monte Carlo
- Debt Freedom

Planning Reports

- Planning results
- Dynamic presentation options

Commonly Asked Questions & Answers

- Common questions and answers
- Data entry mistakes to avoid

Conclusion & Casual Discussion

- Questions, answers and group discussion

Afternoon Session (1:00 pm - 4:30 pm)

TOTAL Planning Suite

Operation and Workflow

- Experience, history and philosophy behind TOTAL Planning Suite
- Using TOTAL effectively and learning best practices

Special Features

- Third party data import
- Age Change Table
- Rental real estate
- Inherited IRAs
- Scenario comparison

Commonly Asked Questions & Answers

- Common questions and answers
- Data entry mistakes to avoid

Planning Reports

- Easy Money Power Planner – goal-based planning
- Golden Years Cash Flow – cash flow planning
- Options for viewing and printing reports
- Analyzing report data and using the audit trail

Conclusion & Casual Discussion

- Questions, answers and group discussion

In-Depth Financial Planning Software
Workshop Registration

Money Tree Software will provide an expert overview of financial planning software, and how each work with different planners' practices. You will learn how to determine which applications are best for clients and how implementing them into your business can increase your revenue. Get updates on enhancements and advanced features for the desktop and online editions. 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.

Price: $75 Half-Day Session - or - **$125 Full-Day Session**

Cancellation Policy:

Cancellation 14 days or more prior to the class: refund of $50 (half-day) / $85 (full-day)
Cancellation less than 14 days prior to the class: refund of $40 (half-day) / $65 (full-day)

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

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: ☐ **Seattle, WA (Friday 9/19)** *Additional locations to be announced…*

Select Session:
☐ **Morning – Silver Financial Planner ($75)**
☐ **Afternoon – TOTAL Planning Suite ($75)**
☐ **Full-Day – Silver Financial Planner and TOTAL Planning Suite ($125)**

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 ____