

PRICING- Financial Mappers PRO

Adviser Fee for New Clients

Advisers: \$2,000.00 per year, excluding GST (\$2,200.00 including GST) paid in advance annually.

This fee includes no charge for Office Admin Staff, Paraplanners, and Connect Clients

Connect Clients (Optional)

This is an optional extra service for your selected clients also having a subscription to their own version of Financial Mappers (free of charge). This means that communication and collaboration with those clients regarding their plan can occur WITHIN the software. The software allows secure passage of documents, plans and Q&A between clients within the Client Portal, where the client has been given access.

The client can then complete the inbuilt Fact Find by completing all the information in the Starting Position and a section About Me and My Family. The adviser can access this information and either party can update it. The client can make their own plans, use the modelling tools, and generate any of the Reports which are part of the standard software package. In addition, the clients can generate the Reports created by the adviser using the **Report Builder**, where these reports are made Visible to the Client. This report can also be uploaded to a chevron called **Plan Review**, which is similar in style to the **Client Review**. The program has an inbuilt **Financial Literacy Program** which can be delivered via automated emails.

The adviser must choose to share a plan with the connect client at which point, the client must make a copy of the plan and can then edit the plan, but they then have ownership of the amended plan. The connect client can also share their plans.

If the adviser chooses, they can select the "Client" as a third option, but they have no access to the software and the adviser cannot communicate with these clients through the software.

There are two types of Connect clients:

- Lite Connect Client (Assess to the first 5-years of a plan).
- Connect Client (Assess to 5 to 50 years of a plan)

Overseas clients DO NOT PAY GST.

Financial Mappers Lite is a separate product which can be used to promote your business where you are not using *Financial Mappers Pro* to make plans and generate reports.

For further information contact Glenis Phillips, the Designer of Financial Mappers

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