

SmartLink for MoneyGuidePro

**Quickly and easily deliver
valued financial plans**

As a trusted advisor, the financial plans you deliver to your clients must have the power to motivate them towards success. Creating the initial financial plan for each client is challenging enough, but providing timely and accurate updates once the plan is in place puts an even greater strain on your time and resources. SmartLink for MoneyGuidePro simplifies this process by giving you online access to the most current investment and policy information for every client.

Create powerful financial plans with ease

SmartLink for MoneyGuidePro, an add-on module to SmartOffice®, makes it easy to leverage your existing client data to build high value plans in the MoneyGuidePro program. Using SmartOffice integrations with leading investment and policy data providers, users can access the most current investment and policy data available, and then populate MoneyGuidePro right from the SmartOffice desktop. The solution automates the data entry process, jumpstarting the creation of each financial plan by automatically populating the fields in each client's financial plan — from detailed client and household information to the most current account values. This one-click process eliminates redundant data entry, minimizes

human error, and reduces the time and cost required to build each plan.



DATASHEET

- Automate the creation of financial plans
- Improve client service by delivering superior financial plans using the most current investment and policy data
- Improve efficiency by leveraging client data to quickly create financial plans
- Create a streamlined planning process that generates more sales
- Reduce errors by eliminating redundant data entry

SmartLink for MoneyGuidePro provides these valuable features:

- > **Automated data exports** ensure that every financial plan you create includes the most current client, investment, and policy data.
- > **One-click integration** allows you to launch MoneyGuidePro and transfer data from your SmartOffice database with a single click of the mouse to accelerate the planning process.
- > **Integrated, web-based solution** gives you online access to the most current investment and policy data for every client.
- > **Streamlined planning process** makes it easier to build comprehensive financial plans that strengthen your client relationships and ensure your ability to deliver top service.

Take the next step toward superior service, greater growth, & better business:

- **SmartOffice® Professional Edition** for Insurance Agents
- **SmartOffice® Premier Edition** for Financial Advisors
- **SmartOffice® Premier Edition** for Brokerage General Agencies

Joseph M. Ackerman (Joe) (Spouse: Katie)

Light | Personal | Add'l Personal | Key Relations | Benefits | Asset Allocation (X) | Performance (J) | Letters/Documents | >>

Personal Information

Last Name: Ackerman Suffix: Middle: M.
 First Name: Joseph Title: Mr.
 Greeting: Joe
 Type: Client Sub-Type: A
 Source: Referral
 Sub-Source:
 Referred By: Randall Halverson
 Birth Date: 02/27/1950 Age: 59
 Marital Status: Married Gender: Male
 Review Date: 08/27/2008 # of Child: 2
 Primary Advisor: Philip Anderson SS #: XXX-XXX-8750

Business Information

Company: Joseph M. Ackerman, M.D., Inc.
 Occupation: Medical
 Job Title: Chief Of Staff

Family Information

Spouse: Kathleen M. Ackerman (Katie) 01/03/1958 (51)
 Business/Professional: Hibbell
 Son: Kenneth 04/15/1990 (19)
 Daughter: Marianne 12/12/1985 (23)

Phone Numbers

Type	Full Phone	Remarks
Residence	(626) 799-2951	
Mobile	(213) 577-0337	
Business	(310) 309-0948 # 152	

Addresses

Type	Complete Address	Map
Residence	488 S. Oakland Avenue Pasadena, CA 91101	
Business	144 Wilshire Blvd., Suite 250 Los Angeles, CA 90007	

E-mail/Web Addresses

Type	Address
E-mail	jackerman@bobbis.com

Joseph Ackerman and his household have the latest investment and policy data downloaded from the various integrations available from SmartOffice.

The demographic, investment, and policy data is transferred to MoneyGuidePro with a single click to provide actual investment and policy data.

MONEYGUIDEPRO®
Financial Planning SMARTware

Main Menu > Clients > My Plans > Profile
 Options | Help | Logout

Joseph and Kathleen Ackerman

Profile:

Personal Information

Resources

- Investment Assets
- Stock Options
- Restricted Stock
- Other Assets
- Insurance Policies**
- Current Allocation (Historical)
- Current Allocation (Projected)
- Liabilities
- Net Worth

Estate Information

Reports

Insurance Policies

All insurance policies can be entered on this page. You can also enter Cash Value Life Policies owned by the Client or Spouse on the Investment Assets page (VL only) or Other Assets page. Cash Value Life Policies owned by the Client or Spouse will be listed on both the Assets page and this page.

Cash Value Life Insurance Policies (included in Assets)

Description	Owner	Insured	Cash Value	Death Benefit	
Mutual Life Insurance Co-20 Pay	Kathleen			\$150,000	Delete
ABC Life-Total Coverage	Joseph		\$99,526	\$449,999	Delete
ABC Life-Assurable Life 3	Kathleen			\$180,000	Delete

Insurance Policies (not included in Assets)

Type	Owner	Insured	Annual Premium	Death Benefit	
ABC Life-American Level 10 Life - Term Life	Joseph	Joseph		\$500,000	Delete
American Life-American Product Life - Term Life	Joseph	Joseph		\$650,000	Delete
Mutual Life Insurance Co-AP Term 80 Life - Term Life	Kathleen	Kathleen		\$610,000	Delete
ABC Life-American Level 20 Life - Term Life	Kathleen	Kathleen		\$116,933	Delete

To learn more about the SmartOffice solution designed for your business,

call 800-777-9188 or go to www.ezdata.com.