SmartLink for MoneyGuidePro

Quickly and easily deliver valued financial plans

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*

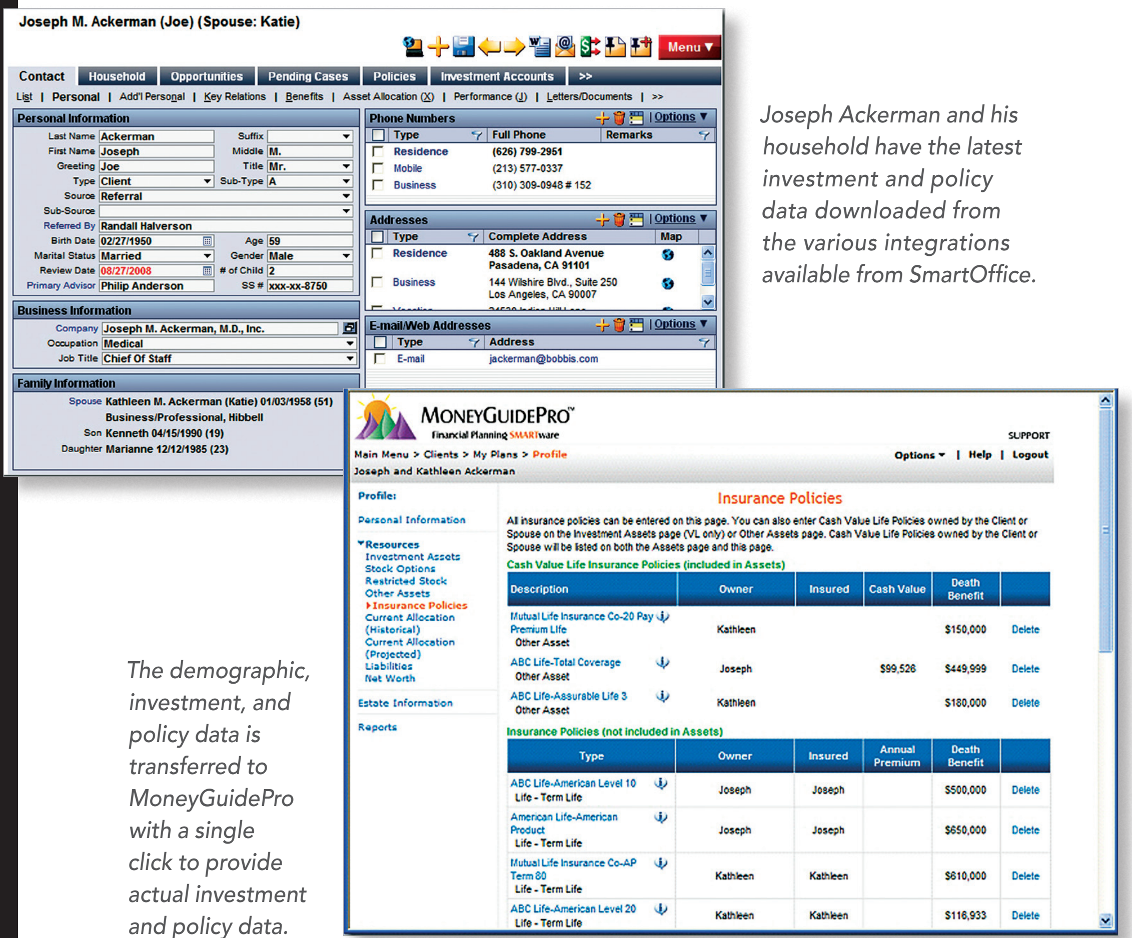
As a trusted advisor, the financial plans you deliver to your clients must have the power to motivate them towards success. Creating the initial financial plan for each client is challenging enough, but providing timely and accurate updates once the plan is in place puts an even greater strain on your 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.

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.*



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.

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**

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

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

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