Money Tree Software
Professional Financial Planning Software Workshops

San Francisco, June 22 - Chicago, July 24 - Anaheim, CA, October 9

8:30 Software Overview and Introduction:

See how the right software increases efficiency, confidence & profitability.

- Experience, history and philosophy behind Money Tree Software
- Product overview and feature summary
- How to select the right report set for your client

9:00 Silver Financial Planner and Silver On-Line

- Basic application introduction, functions and operation
- Preparing clear financial plans in minutes, an economical and effective planning system
- Demonstration of the powerful "What-If?" retirement graph system
- Introduction to the new "When-If?" behavioral analysis system
- Silver Online – planning from anywhere, with client access to reports and data

10:00 Morning break – snacks and networking with other advisors

10:20 Distribution Solutions (New)

- How to solve your laid-off clients retirement plan challenges
- Powerful new applications for 72(t), Roth conversions, RMD, Rollovers and more

11:00 TOTAL Planning Suite – Getting Started

- Basic application introduction
- Database structure and client records management
- Menu and general operating tutorial

12:00 Lunch & Networking: *Lunch and breaks included with registration.*

12:45 TOTAL Planning Suite - Creating the Plan

- Data collection, "Quick Input" and "Secure On-Line Planning Survey"
- Entering contact and financial data, modeling complex situations, downloading data
- Adding complete planning flexibility with Age Change Event Tables

2:30 Afternoon break - snacks & networking

2:45 TOTAL Planning Suite – Reviewing and Presenting Reports

- Reports – viewing, printing, analysis & audit trail
- Easy Money: *Goal Based Planning*
- Golden Years*: Cash Flow Based Planning*
- Strategic Solutions: *Specialized report modules*
- Distribution Solutions: *New release for RMD, 72(t), Roth conversion, and more.*

4:15 Summary

- Using Money Tree Software to increase your productivity
- Costs and benefits of planning & presentation options
- Questions, Answers and Group Discussion

4:45 Conclusion & Casual Discussion

Professional Financial Planning
Software Workshop Registration

MONEY TREE SOFTWARE

The key developers at Money Tree Software provide an expert overview of financial planning software, and how each work with different planners' practices. You'll learn how to determine which applications are best for each client and how implementing them into your business can increase your revenue. Get updates on enhancements and advanced features. 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 now using Money Tree applications, as well as planners evaluating new financial planning software. Learn about the many new and advanced features in both Silver and TOTAL Planning Suite. See the new Silver On-Line and other web based systems. If you want to know about the best planning software for your practice, you're encouraged to attend.

Price: $175 includes lunch, snacks and refreshments

Cancellation Policy: Cancellation 14 days or more prior to the class: refund of $125
Cancellation less than 14 days prior to the class: refund of $75

Time: Workshops begin at 8:30 a.m. and conclude at 4:45 (Break and ending times are estimates)

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. These 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.

- ☐ San Francisco, CA — Monday, June 22
- ☐ Rosemont, IL (Chicago) — Friday, July 24
- ☐ Anaheim, CA (LA area) — Friday, October 9 (before FPA National)

Name ______________________________

Company ______________________________

Address ______________________________

City ______________________ State ____ Zip __________

Phone __________ Email ______________________

Payment: ☐ MasterCard ☐ VISA ☐ Discover ☐ American Express ☐ Check attached

Card number ____________________ *Exp date* ________ *Security code* ______

Card Billing address (if different) ______________________________

Confirmation and hotel information will be sent upon receipt of registration.