

INTERACTIVE FINANCIAL PLANNING – FROM YOUR OFFICE TO YOUR CONFERENCE ROOM

5.26.2016 | PEAK ADVISOR ALLIANCE

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Handouts/Additional Materials at: kitces.com/PEAK16

FINANCIAL PLANNING RELATIONSHIP OF THE FUTURE

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- Perry the Planner & Carl the Client, working together 4 years



CARL
Client
Early-60s



PERRY
Planner
Mid-40s

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- Carl's financial plan lives in the cloud and can be accessed anywhere, from any device



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- Both Perry and Carl can keep track of how Carl is proceeding towards his financial goals on an ongoing basis, with continuous integrated data updates



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- Perry can also monitor how well Carl is implementing his goals and action items on an ongoing basis and send reminders and positive feedback



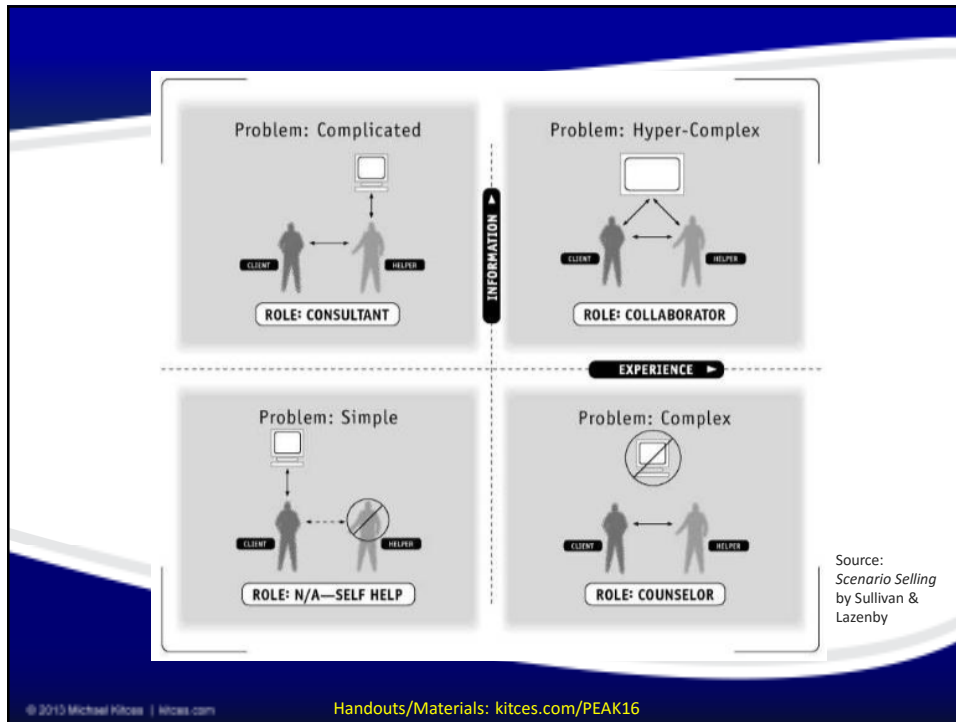
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Financial Planning Software Of The Past, Present, And Future

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THE EFFICIENCY OF INTERACTIVE PLANNING

- Iterating "What-If" Scenarios & "Test Driving" the plan
- Exploring The Possibilities



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EXPLORING POSSIBILITIES



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OPPORTUNITIES IN PRACTICE

- 1) Is Your Conference Room Set Up To Handle Interactive, Collaborative Financial Planning?
 - Big TV with connected computer?
- 2) Is Your Financial Planning Software Conducive To Interactive Planning?
 - Are you using spreadsheets, or 'real' planning software?
- 3) Do You Know Your Software Well Enough To Use It Live?
 - Time for more training?
 - The "Mr. Sulu" model?

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ARE YOU READY TO MOVE
YOUR FINANCIAL PLANNING
FROM YOUR OFFICE
TO THE CONFERENCE ROOM?

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QUESTIONS?

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