

MoneyGuidePro®

+ Sophisticated Planning = Higher Value Advice



What is MoneyGuidePro®?

MoneyGuidePro, the industry's leading financial planning software, provides robust goal-based financial planning solutions to help advisors navigate the complex financial elements of their clients' lives.

Fast, easy, and adaptable, MoneyGuidePro identifies gaps, empowers clients to stress test their plans, and is equipped with a Social Security maximizer, 100+ tech integrations, account aggregation, and more to provide a profitable and engaging planning experience for advisors and their clients.

Key Features



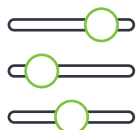
Auto Goals

Leverage AI to create a fun, motivating lifestyle in one click



What if Worksheet

The Power-User feature, change up to five scenarios in one place



Play Zone®

The most collaborative way to help clients adjust what's in their control



Social Security Optimization

The strategy may pay the most, but is it the best for the plan?



Client Portal

Give your clients the portal experience that focuses on long-term success



Plan Analytics

Access plan data and review your book – including planning usage, key metrics and trends

Goals



64 in 2026



65 in 2027

Needs



\$ 75,000



100 % or \$12,644



\$ 49,000



Total Spending: \$3,335,879 ?



Total Spending: \$3,273,881

[Details](#)[Details](#)

Advisor Benefits Include:

- Add your firm's logo to create a customized experience.
- Free administrative assistant login.
- Customize CMAs, portfolios, and report templates.
- Access to our award-winning Support Team.
- Includes risk management, long term care, and insurance analysis features.
- New user onboarding, plan reviews, best practice calls, and more.

**Brad Barker, Account Manager**

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