MoneyGuideElite℠

Address the Planning Challenges of the Future

What is MoneyGuideElite℠?

MoneyGuideElite is an interactive planning solution that includes all the features of MoneyGuidePro® **PLUS** enables advisors to visually illustrate income distribution, tax planning and lifetime protection strategies, and the benefits and trade-offs of annuities.

Through enhanced charts and an immersive client experience, MoneyGuideElite brings these dynamic solution-based strategies together to help advisors build their story and have more effective conversations that motivate clients to take action.

Key Features

Tax Planning
Quantify the savings and illustrate the impact of tax strategies in the plan

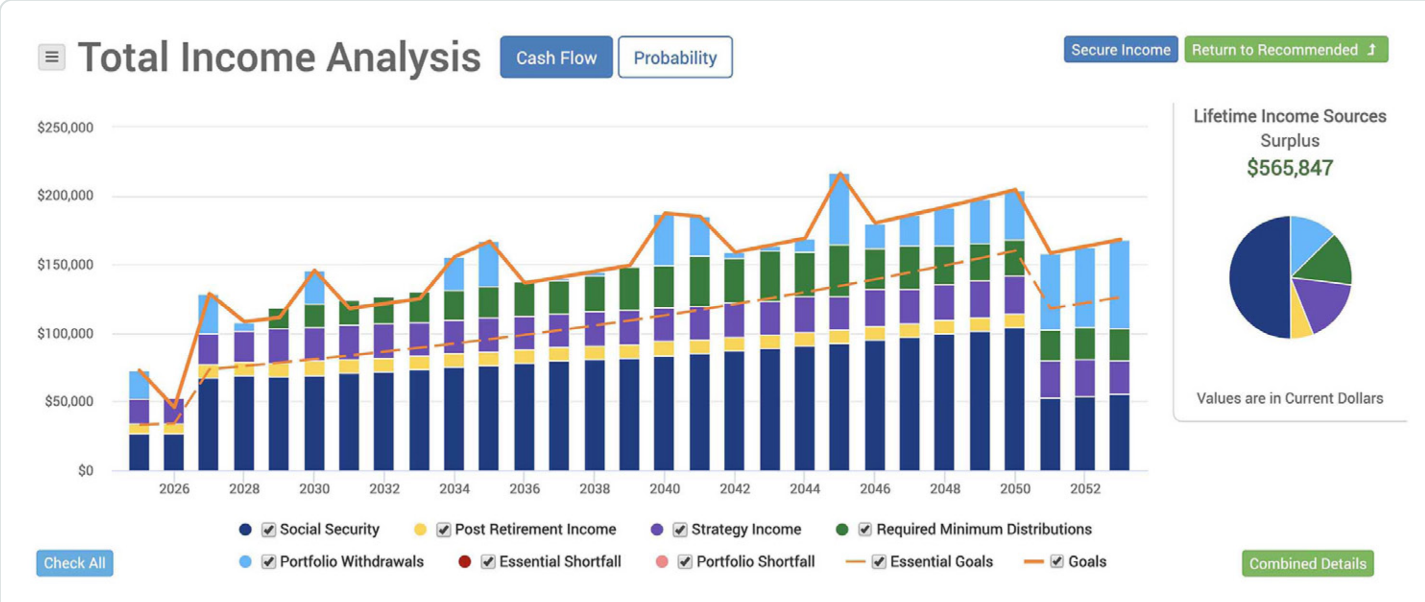
Plan Analytics
Access plan data and review your book – like planning usage, key metrics and trends

Advanced Lifetime Protection
Protect your clients over their lifetime, not just today

Total Income Modeling
Dynamic distribution presentation module

Secure Income Modeling
Advanced annuity strategy modeling to cover essential expenses.

And More!



For illustrative purposes only. Not based on actual client data.

Advisor Benefits: Unlock strategies to fully service your clients and help them achieve their goals

Tax Planning: Illustrate tax strategies that auto calculate the amount to convert to a Roth, Qualified Distributions and Qualified Charitable Distributions. Help reduce a client's tax burden during retirement and quantify the tax savings of these strategies in the plan.

Lifetime Protection: Visualize insurance needs over time and solve for laddered strategies. The end-to-end solution allows the advisor to add their own solutions and the software provides quotes so the clients can see what the strategy will cost.

Total Income: Demonstrate where your client's money is coming from during the distribution phase of their plan while testing for market volatility, changes in social security timing and required minimum distributions.

Secure Income: Discover if an annuity is appropriate for your client. Easily model complex annuity strategies and reveal how the resulting income can fill the gap between anticipated funding and essential retirement spending.

XY PLANNING NETWORK

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