FP Solutions™ Software Features

	FP Solutions Basic	FP Solutions Plus	FP Solutions Advanced	FP Solutions Business
Software Features				
Annual Review Tool	Yes	Yes	Yes	Yes
Solve for deposit, withdrawal and amount	Yes	Yes	Yes	Yes
Data entry wizards	Yes	Yes	Yes	Yes
Common planning strategies	Yes	Yes	Yes	Yes
Ability to create custom documents / reports	Yes	Yes	Yes	Yes
Electronic fact finder and client snapshot	Yes	Yes	Yes	Yes
Planning concepts (Leverage, Estate Protection, etc.)	Yes	Yes	Yes	Yes
Monte Carlo Simulations	Yes	Yes	Yes	Yes
Spreadsheet view			Yes	Yes
Planning assistant			Yes	Yes
Planning Modules				
FP Focus – Executive Summary	Yes	Yes	Yes	Yes
Investment Profile, KYC	Yes	Yes	Yes	Yes
Lifestyle Needs	Yes	Yes	Yes	Yes
Sources of Income	Yes	Yes	Yes	Yes
Non-registered Investments	Yes	Yes	Yes	Yes
Tax Free Savings Account	Yes	Yes	Yes	Yes
Education Savings	Yes	Yes	Yes	Yes
Trust Investments	Yes	Yes	Yes	Yes
Registered Investments	Yes	Yes	Yes	Yes
Defined Contribution Pensions	Yes	Yes	Yes	Yes
Defined Benefit Pensions	Yes	Yes	Yes	Yes
Annuities	Yes	Yes	Yes	Yes
Personal Use Real Estate, cottage	Yes	Yes	Yes	Yes
Other Assets	Yes	Yes	Yes	Yes
Other Loans	Yes	Yes	Yes	Yes
Other Debts	Yes	Yes	Yes	Yes
Life Insurance	Yes	Yes	Yes	Yes
Retirement Capital Needs (saving & investing)	Yes	Yes	Yes	Yes
Commercial Real Estate		Yes	Yes	Yes
Stock Options		Yes	Yes	Yes
Survivor Capital Needs (life insurance)		Yes	Yes	Yes
Estate Capital Needs (tax and liquidity)		Yes	Yes	Yes
Disability Capital Needs (DI, CI, LTC)		Yes	Yes	Yes
Advanced Income Projections			Yes	Yes
Advanced Cash Flow Projections			Yes	Yes
Advanced Net Worth Projections			Yes	Yes
Change in Financial Position, Value of advice			Yes	Yes
Corporate Planning:				
- Estate freezes, family trust				Yes
- Crystallize capital gains				Yes
- Share redemption planning				Yes
- CDA & RDTOH calculations				Yes
- Holding companies				Yes
- Operating companies				Yes
- Corporate owned life insurance				Yes
- Corporate owned investment portfolio				Yes
- Corporate owned real estate				Yes

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FP Solutions™ Top Ten Features

Feature	Description	Benefit of using FP Solutions
T1 Tax Calculation	Performs T1 tax calculations every single year of the plan.	T1 tax calculations provide more accurate results and reduce the possibility that assets and income taxes are being under or over-stated.
Fact Finder	An electronic Fact Finder that mirrors the paper version and fully integrates into the planning software. Can be emailed and completed by clients.	Advisors save time during the data entry process. Also, the flexibility of the Fact Finder allows them to engage clients in the planning process.
FP Focus	Powerful executive summary for both new prospects and existing clients.	Fast data entry and client-friendly reporting. FP Focus provides a compelling financial snapshot for any client situation.
Optimization	Integrated solve engine that eliminates excess and deficiencies from cash flow based on the planners selections.	Quickly determines the clients' ability to meet their planned lifestyle by using assets available within the plan.
Planning Assistant	A seven step wizard that guides the advisor through the process of building a financial plan. As part of this process, the wizard helps the advisor select and implement common planning strategies.	The Planning Assistant acts as an expert guide in the financial planning process. As well, the FP Solutions Planning Assistant meets and exceeds FPSC Standards.
Planning Strategies	20 common planning strategies including income splitting, retirement and investment strategies, and tax planning.	Apply appropriate planning strategies as part of overall recommendations and program will automatically implement into plan.
Planning Concepts	14 fully integrated planning concepts that can be included as part of the financial plan or available as stand-alone reports.	Powerful sales tools when used on their own, and easily integrated into a full financial plan. The planning concepts focus on helping the advisor highlight the need for specific financial products and services.
Value of Advice and Return on Advice	Two persuasive planning tools that show the value of the advisor's recommendations and the financial plan.	Both tools provide a measure of performance and provide validation of the financial plan. Shows how the financial plan can be the best investment the client can make.
Customization	FP Solutions' Report Editor allows advisors to customize any document to create personalized plans and reports for any client. Advisors can add notes, commentary – even pictures – to create a truly individual plan for each client.	Since FP Solutions uses Excel, Advisors can create powerful custom documents without being expert programmers. Customizing and personalizing the documents allows advisors to establish their brand and distinguish themselves from their competition.
Software Support	FP Solutions is fully supported with a highly experienced training team and a variety of training options to suit the needs of our clients. FP Solutions is also supported by a two-tiered technical support team to assist clients in utilizing the software successfully.	These teams know the software and understand the business of financial planning. CCH is committed to providing industry-leading support and training for this program.

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