



Feature Comparison

Profiles Forecaster & Profiles Professional

Modular needs assessment

Profiles Forecaster

Profiles Forecaster is a goals-based program that centers on five basic modules. The modules can be used independently or in combination for more complete analysis of a client's financial needs. Its interview-style design enables advisors to create dynamic, graphic-rich presentations in as little as 20 minutes.

Detailed financial analysis

Profiles Professional

Profiles Professional covers 13 personal and four business planning modules that allow advisors to tailor each analysis based on client needs. The program's flexible design accommodates goals-based planning, and it performs cash flow-based projections. A library of more than 400 client reports features colorful, easy-to-read presentations.

Find out more

Visit eisi.com:

- See it – register for a free demo
- Try it – download a free, 30-day trial
- Buy it – get cost & licensing information

Call 888-692-3474 (option 2) to ask about:

- Albridge integration
- Profiles OnDemand (Web-based)
- Optional modules

At a glance

Features	Profiles Forecaster	Profiles Professional
Integrated planning modules & levels	■	■
Professional reports & graphs	■	■
Retirement accumulation	■	■
Retirement distribution		■
Retirement scenarios		■
Education goals	■	■
Accumulation / major purchase goals		■
Survivor needs	■	■
Long-Term Care needs	■	■
Disability needs	■	■
Ibbotson asset allocation	Optional*	■
Ibbotson security classifier	Optional*	Optional
Portfolio reallocation		■
Portfolio rebalancing		■
Monte Carlo probability analysis		Optional
Employee stock options		■
Estate planning		■
Advanced estate planning		Optional
Financial statements (e.g., Net Worth)		■
Income tax analysis		■
Financial calculators	■	■
Business continuation planning		■
Forefield content	Optional	Optional

*The Ibbotson security classifier is included in the optional asset allocation module.

Industry-leading software. Incomparable service. Unrivaled scale.

EISI EISI, developer of NaviPlan and Profiles software, offers the broadest selection of needs-assessment and financial planning tools in North America. Industry-leading software, combined with incomparable service and unrivaled scale, makes EISI the technology partner of choice for more than 250,000 financial professionals.