



Profiles Forecaster

Clear, easy-to-use needs analysis software for financial assessments

Complete an analysis in as little as five minutes. Profiles Forecaster is an easy-to-learn, goals-based application that keeps data entry to a minimum. You can tailor action-oriented results in a clear, ready-to-present format. It's ideal for qualifying prospects and providing a basic financial assessment to investors with assets under management of \$500,000 or less.

Features

- Interview-style user interface design
- Goals-based application
- Quick case input and client presentation generation
- Highly graphical reports
- Output is periodically submitted to FINRA for review and comment
- Data can be seamlessly promoted to Profiles Professional for more detailed planning

Assessments and Planning

- Planning modules:
 - Retirement accumulation
 - Education goals
 - Survivor needs
 - Disability needs
 - Long-term care needs
 - Ibbotson® Asset Allocation™¹ (optional)
- Financial statements including net worth and budgeting
- Create an assessment in 5 to 25 minutes

What Profiles Forecaster users are saying

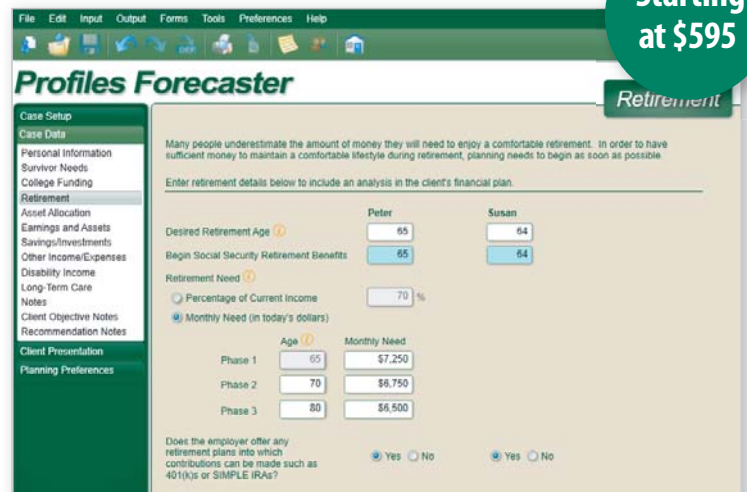
"I'm better able to uncover the needs of my clients."

"Short client reports are easy to understand and explain to my clients."

"The sale is quicker and easier."

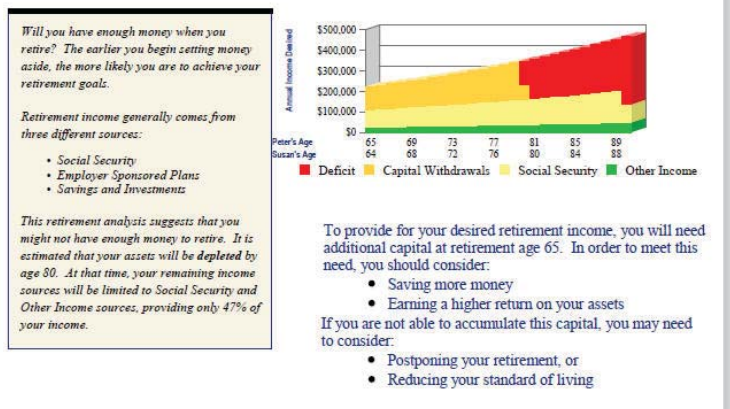
"Clients love the analysis. They understand it."

Starting at \$595



Quickly gather details to prepare a basic retirement assessment – one of six modules available.

Retirement Needs Analysis



INDUSTRY-LEADING SOFTWARE • INCOMPARABLE SERVICE • UNRIVALED SCALE



Zywave (formerly EISI), developer of NaviPlan and Profiles software, offers the broadest selection of needs analysis and financial planning tools in North America. Zywave solutions can help you get more clients, keep more clients, and sell more products and services.

Marketing and data-gathering tools²

Beautifully designed, graphic-rich brochures make a great addition to your sales and marketing campaigns. Plus, prepared fact finders and questionnaires streamline your data-gathering efforts and help you establish rapport and build trust with your clients.

Integrations

Save time and reduce data entry errors by automatically populating Profiles Forecaster with your clients' demographic and portfolio information. Data import capabilities are available to registered users of Albridge[®], Redtail CRM¹ and TD Ameritrade's Veo[®] platform, each available with Web format.

Optional Features¹

Ibbotson[®] Asset Allocation[™] module

This optional module enables you to examine a client's current asset allocation in relation to their risk tolerance and time horizon, and then make asset repositioning and purchasing recommendations. It includes the Ibbotson Security Classifier, a database of more than 97,000 securities that gives you access to historical return, risk, asset class, and model portfolio data.

Forefield content

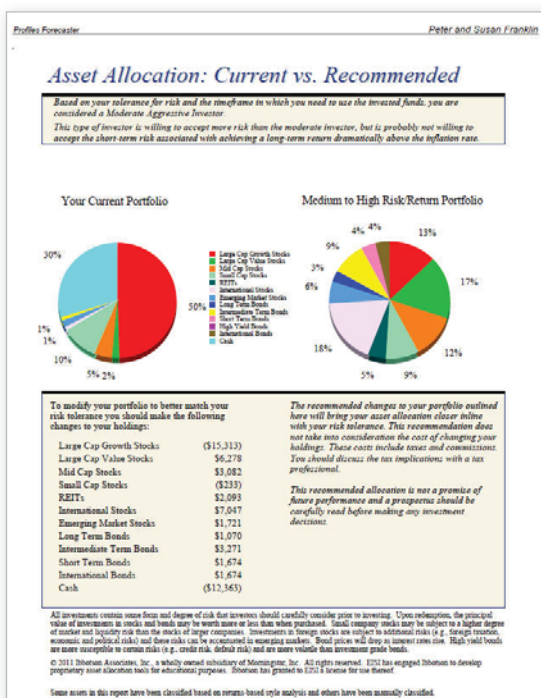
Add value and content to your client communications. A wide range of Forefield educational materials can be accessed from within Profiles Forecaster to supplement your client reports. These FINRA-reviewed reports provide important insights into financial planning concepts. This content may be purchased online through Forefield.

Web and desktop formats

Profiles Forecaster can be delivered in a Web-based environment with the highest possible level of data security certification, or as a desktop application with no Internet connection required. A unique check-in/check-out feature enables you to connect to a centralized database from virtually anywhere, or disconnect and work on your assessments on a laptop when an internet connection is not available.

¹Additional fees apply.

²Available for purchase.



Explore asset allocation options with detailed client report pages.

Free training

Getting started with Profiles Forecaster is easy. In less than an hour, learn how to build a client case, analyze your clients' financial situations, and present recommendations. On our support site, access free self-study guides and videos or register for live Web-based training.

Visit support.eisi.com/forecaster.

Support

We're here to help. 24/7 online support is available via User Services – a secure customer Web portal that enables you to safely upload client files and work with a Technical Support Specialist to resolve an issue. Help is conveniently available within the software. Our Technical Support Specialists can also assist you via toll-free telephone with both operational and functional questions.

Learn more at www.eisi.com/forecaster

SEE IT

Attend a demo

BUY IT

Purchase Profiles Forecaster online or by phone

Contact a Zywave (formerly EISI) Representative at (888) 692-3474, option 2, or sales@eisi.com

Additional options are available for multi-seat firms and organizations. Contact us for more information.