



Industry-leading software

Feature comparison: NaviPlan Standard & NaviPlan Extended

Flexible, goal-based tools

NaviPlan Standard (NPS)

NaviPlan Standard packages a full range of planning features into three easy-to-use analysis levels and two pre-planning levels to accommodate everything from quick pre-defined scenarios to comprehensive financial plans. It is designed for advisors who deal with a wide range of financial planning concepts.

Sophisticated, cash flow-based tools

NaviPlan Extended (NPE)

The planning features in NaviPlan Extended are divided into two levels to provide intermediate and advanced cash flow-based planning options. Level 1 is a subset of the application that requires significantly less data entry. These plans can be promoted to Level 2 to reveal the program's full functionality.

Find out more

Visit eisi.com to:

- Register for a live, Web-based demo
- Download a free 30-day trial
- View sample client reports
- Learn about training & support services

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

- Data import sources, such as Albridge Solutions
- Online and Offline planning with NaviPlan Central (ASP platform)
- NaviPlan Central management and compliance tools

At a glance

Features	NaviPlan Standard	NaviPlan Extended
Integrated planning modules & levels	■	■
Professional reports and graphs	■	■
Financial calculators	■	■
Financial Assessment (needs-analysis)	■	■
Pre-retirement / Retirement cash flow	■	■
Retirement – accumulation & distribution	■	■
Education goals	■	■
Major purchase goals	■	■
Emergency fund goals	■	■
Survivor needs	■	■
Long-Term Care needs	■	■
Disability needs	■	■
Monte Carlo probability analysis	■	■
Asset allocation - user-defined or Ibbotson	Optional	Optional
Estate planning	■	■
Advanced estate planning	■	■
Income tax – average rates	■	■
Income tax – Federal & State	■	■
Employee stock options	■	■
Business planning	■	■
Cash Flow Assistant™	■	■
Planning Assistant™	■	■
Workflow & case sharing	■	■

Industry-leading software. Incomparable service. Unrivaled scale.



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 120,000 financial professionals.