SmartOffice
MoneyGuidePro Integration

Deliver financial plans to your clients quickly and easily

As a trusted advisor, you strive to create financial plans that motivate your clients toward success. Creating the initial plan for each client is time-consuming enough; providing timely and accurate updates once the plan is in place puts an even greater strain on your time and resources. The MoneyGuidePro integration with SmartOffice simplifies this process by giving you online access to the most current investment and policy information for every client.

Create powerful financial plans with ease

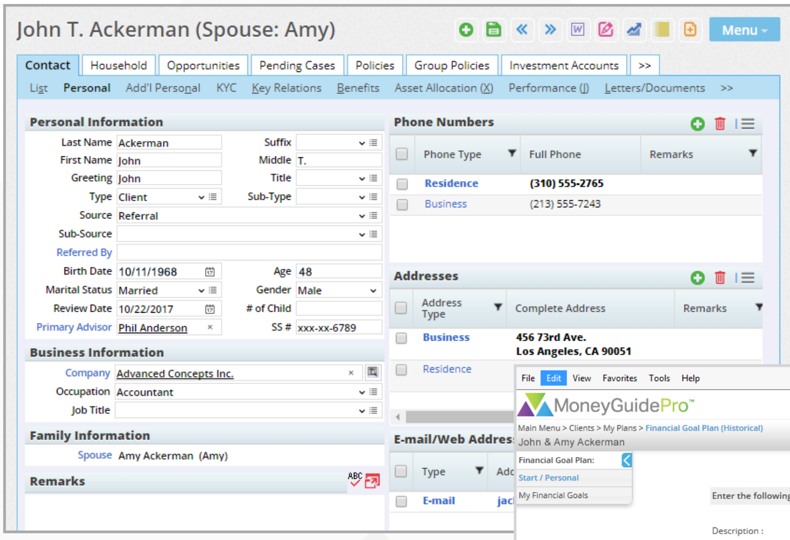
The MoneyGuidePro integration lets you easily leverage your existing client data in SmartOffice to build high-value plans in MoneyGuidePro. Using SmartOffice's integration with leading investment and policy data providers, you can access your clients' most current financial data and import it directly into MoneyGuidePro. This solution automates the data entry process, jump-starting the creation of each financial plan by automatically filling in important fields—from detailed client and household information to the most current account values. This one-click process eliminates redundant data entry, minimizes human error and reduces the time and cost required to build each plan.

Key Benefits

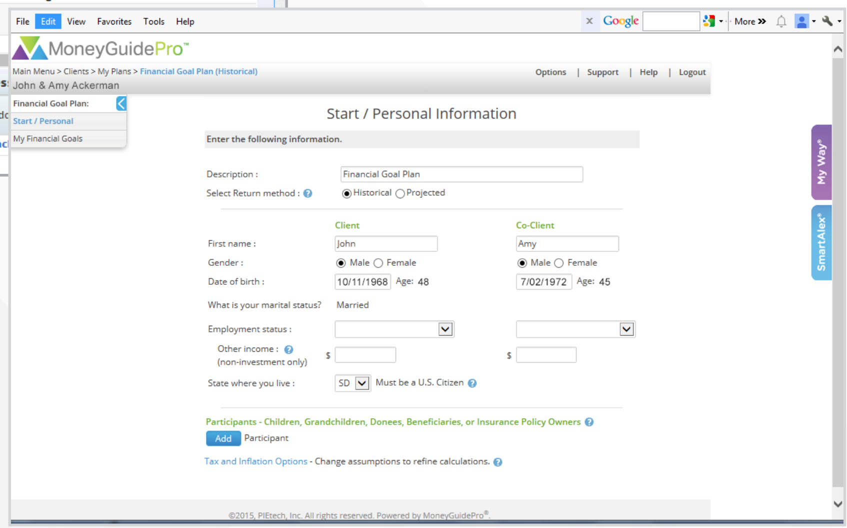
- Automate the creation of financial plans
- Improve client service by delivering superior financial plans current investment and policy data
- Improve efficiency by leveraging existing client data
- Create a streamlined planning process that generates more sales
- Reduce errors by eliminating redundant data

The MoneyGuidePro Integration with SmartOffice provides these valuable features

- Automated data exports ensure that every financial plan you create includes the most current client, investment, and policy data.
- Integration allows you to launch MoneyGuidePro and transfer data from your SmartOffice database with a single click.
- Integrated, web-based solution gives you access to the most current investment and policy data for every client.
- Streamlined planning process makes it easier to build comprehensive financial plans that strengthen your client relationships and ensure your ability to deliver top-level service.



The client's SmartOffice record contains the latest investment and policy data downloaded from the various integrations available for SmartOffice.



Demographic, investment, and policy data from the SmartOffice record is imported into MoneyGuidePro to create the financial plan.

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