

How Goals-Based Planning *Elevates* the Advisor-Client Conversation

One powerful benefit of goals-based planning is helping advisors prove their value and strengthen their client relationships through more in-depth, meaningful conversations about what clients really care about:

Advisors using goals-based planning can report on:

- ✓ Performance against the benchmark
- ✓ Current financial goals
- ✓ Time horizon for each goal
- ✓ Percentage funded
- ✓ Probability of success
- ✓ Potential asset allocation adjustments
- ✓ New assets or goals

Advisors who *aren't* using goals-based planning can report on:

- ✓ Performance against the benchmark
- ✗ Current financial goals
- ✗ Time horizon for each goal
- ✗ Percentage funded
- ✗ Probability of success
- ✗ Potential asset allocation adjustments
- ✗ New assets or goals

Discover how the right technology can *empower* goals-based planning.

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