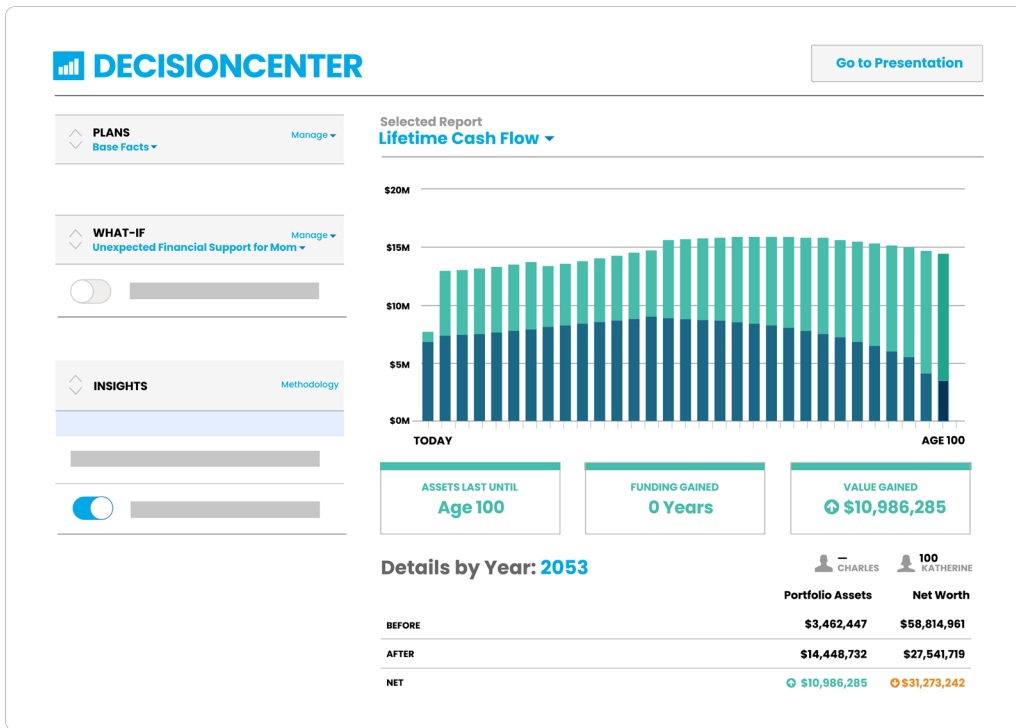


Demonstrate Your Value



Select a Plan

Collaborate on Options

Review Each Decision

Organize the Facts

Visualize the Results

Analyze the Details

Instantly Visualize the Impact of Your Recommendations



Model the Future

Offer your clients in-depth and personalized insights using a variety of techniques and what-if scenarios.



Simulate Multiple Scenarios

Use solvers to answer questions and adjust options in real time.



Streamline Your Planning Workflow

Access reports, charts, and data tables to seamlessly shift from cash flow to estate planning—all in one place.

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