

SOFTWARE

1. CFPS Computer Runs

This program requires that you have Microsoft Excel installed on your computer. It contains 25 spreadsheet programs which produce quality illustrations for your financial plan document, including:



Initial supply provided: one
Cost per item to reorder: \$10

- Business Profit Projection
- College Funding Analysis
- Debt Restructure Summary
- Estate Tax Illustration
- Future Income Illustration
- Home Acquisition Analysis
- Life Insurance Analysis
- Monthly Expense Projection
- Net Income Illustration
- Pension Maximization Illustration
- Rental Analysis
- Retirement Needs Analysis
- Savings Projection
- Survivor Needs Analysis
- Tax Projection
- Variable Expense Summary



Initial supply provided: one
Cost per item to reorder: \$10

2. CFPS Brief Pages

This program contains all the CFPS standard brief pages in Adobe Acrobat®. You can choose from over 100 illustration pages and articles which explain important financial concepts in easy-to-understand terms.



Initial supply provided: one
Cost per item to reorder: \$10

3. CFPS Recommendations

This program requires that you have Microsoft Word installed on your computer. It contains all of the word processing templates that you will need to prepare customized recommendations for your financial plan document, including:

- 65 Standard Recommendations
- Implementation Schedule
- Distribution Illustrations
- Investment Pyramids
- Standard Letters
- Custom Illustrations