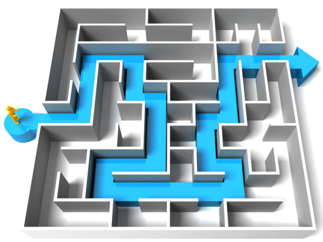

# Retirement Planning Software Doesn't Have To Be A Maze

If you don't mind spending multiple hours completing a retirement plan and you and your clients enjoy 100+ page reports, the WealthTrace Retirement Planner is probably not for you.

But if you want to spend less time with cumbersome software and more time talking to your clients, we might very well have what you're looking for.

Built with an easy to use, intuitive interface, WealthTrace makes getting started and generating a retirement plan a breeze.

Even with the most intuitive interface in the industry, we do not sacrifice accuracy or powerful analysis.

Your clients can even be involved, using the on-screen interactive sliders to change multiple settings and spending amounts. Watch along with your clients as results and vivid, colorful graphs change in real time.

Because our software is web-based, you can even give clients access to their plan through our client portal. You decide the level of control they have over the plan.

Many advisors have been asking themselves for years, "Why is it so difficult and cumbersome to build a retirement plan for my clients?"

We asked ourselves the same thing, which is how the WealthTrace Retirement Planner came to be.

Built by a financial advisor, our software has finally made retirement planning easy, intuitive, and interactive for both advisors and their clients.

WealthTrace Sales
855-742-6026
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wealthtrace
Retirement Planning Software

wealthtrace™

## Intuitive, Accurate, Visual, Easy To Use

## A New Approach To Retirement Planning

**www.mywealthtrace.com**

# INTUITIVE

## EASY TO USE

# INTERACTIVE

Finally there is a retirement planning solution that is accurate, flexible, interactive, and extremely easy to use.

## WHAT MAKES US DIFFERENT?

A simple, clean, and intuitive interface that is easy to use.

Ability to make quick changes with easy navigation.

A quick start. Our intuitive interface allows you to jump right in.

Immediate answers on the screen, not buried in pages of reports.

An on-screen, easy to find answer as to how the most important variables affect the plan.

Advisors can easily create their own asset classes and use these for asset allocation purposes and in Monte Carlo simulations.

Easily change any input or assumption, including the distribution type, standard deviations and correlations used in Monte Carlo analysis.

With our interactive and easy to use interface, the days of searching through pages of reports to find your answers are over.

## KEY FEATURES

- Monte Carlo Analysis
- Goals-Based Planning
- What If Scenarios
- Program-Generated Ideas & Solutions
- Interactive Sliders For Goals
- Vector Inflation And Returns Through Time
- Rebalance And Reallocate Investments
- Choose From Multiple Interactive Charts
- View Outputs In Inflation-Adjusted Dollars
- Client Portal
- Professional Reporting