



Practical Needs Analysis and Financial Planning Software

- ⇒ Tired of spending inordinate amounts of time developing recommendations for your mid-market clients?
- ⇒ Looking for a tool that generates professional client reports - fast?
- ⇒ Worried about liability and having a record of your recommendations?
- ⇒ Wishing you could create a sense of urgency?

IncomeMax is a goal-driven "Total Needs Selling" software tool that enables advisors and agents to quickly capture, analyze and graphically illustrate a client's most common needs. Graphically position product solutions, compare alternative scenarios, and generate professional client presentations. IncomeMax provides 80% of the functionality found in sophisticated financial planning applications with only 20% of the complexity - ideal for your middle-market clients.

IncomeMax enables you to quickly determine a client's most common needs and position your solutions.

- ⇒ Retirement Planning
- ⇒ College Funding
- ⇒ Survivor Needs
- ⇒ Long Term Care
- ⇒ Disability

Insurance Needs - Quickly identify a client's insurance needs (Life, Disability, LTC) and position solutions that eliminate risk.

Retirement and College - Create professional plans in significantly less time.

IncomeMax Features Summary:

- Ease-of-use: Users are guided through needs discovery process. Great sales track for new professionals.
- Illustrate Solutions: Illustrate how your product recommendations assist clients in meeting goals.
- Product and Scenario Comparisons: Quickly and graphically compare product or scenario performance.
- Asset Allocation: Model current and recommended asset allocations with this optional add-on.
- Client friendly interface: Designed to be used in front of your clients.
- Graphical results: Flow easily between inputs and graphical results to answer what-if questions.
- Professional reports: Easy to understand client reports produced in industry standard (pdf) format.
- Liability protection: Auto-generated hold-harmless agreements protect you from future E&O claims.

Pricing

- IncomeMax has a retail price of \$399 per user. Asset Allocation add-on is \$89. Annual renewal fee of \$129.

Training and Support

- Users find our 2 hr web-based Quick Start class is sufficient to become very productive.
- We offer e-mail support and a toll-free support line.

FREE TRIAL

Visit www.cygnussoft.com to learn more about IncomeMax and download a trial version.

Contact Cygnus Software

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