

## When every advisor in your firm is a Premier Member, everyone wins.

- ▶ Your advisors win when they accurately and seamlessly gather information and document conversations in the client record.
- ▶ Your clients win when advisors can easily focus their planning activities to be efficient and diligent to help them reach their planning goals.
- ▶ Your firm wins when advisors can lead with systematized, actionable priorities rooted in client needs to deliver an unparalleled experience.
- ▶ Your clients win when they are immersed in an experience that uncovers planning opportunities and serves their holistic planning needs.

## Premier Membership is meaningful for advisors.

- ▶ Draw clients into the financial planning process using Share A Link for interactive checklists.
- ▶ Capture notes directly in the interactive checklists to create accurate, detailed records of conversations.
- ▶ Leverage the CRM notes integration functionality to clearly identify planning opportunities that are organized into follow-up and follow-through tasks.
- ▶ With a single click, send notes directly to the client record in Wealthbox, Redtail, Salesforce Financial Cloud Services, and XLR8 for Salesforce. Using a different CRM? Just cut and paste the notes into the client record.
- ▶ Achieve peace-of-mind knowing every advisor has accurate, up-to-date information.

## Administration is easy.

- ▶ Appoint a firm-level administrator with privileges to manage advisor access, set firm-wide branding and personalize the guides for each advisor.
- ▶ Receive one consolidated, annual invoice.
- ▶ Choose your payment method: credit card, ACH transfer, or check.

	ANNUAL PRICE	DISCOUNT
2 - 5 Advisors	\$424 per advisor	15%
6 - 20 Advisors	\$399 per advisor	20%
21 - 50 Advisors	\$374 per advisor	25%
51 - 100 Advisors	\$349 per advisor	30%
100+ Advisors	Contact us!	Contact us!

*\*Ensemble pricing requires a single payer.*

*\*Ensemble Premier pricing includes branding for 1 firm.*

**Take action today** and give your advisors the gift of tools that will help them move closer to their goals. Contact [support@fppathfinder.com](mailto:support@fppathfinder.com) for more information.