



FinPlan Writer

Features

- 1) Goal Achievement
- 2) Asset Allocation & Investment Planning
- 3) Life Insurance Need Analysis
- 4) Health Coverage Need Analysis
- 5) Risk Management
- 6) Risk Profiling
- 7) Retirement Planning
- 8) Cash Flow Management
- 9) Computation of Net Worth
- 10) Wealth Management Module (Advisor's Den)
- 11) Action and Recommendation Plan
- 12) Disclosures and Assumptions

Freebies Offered with the Software

- 1) All ULIP Schemes (unstructured) Calculator
- 2) Mutual Fund ELSS Calculator
- 3) ULIP vs. Mutual Fund ELSS Comparison
- 4) 54EC Bonds vs. Mutual Fund Comparison
- 5) Mutual Fund SIP Calculator
- 6) Mutual Fund SWP Calculator
- 7) Loan EMI Calculator
- 8) Flat Rate to Effective Rate Converter
- 9) Independent Goal Achievement Calculator
- 10) Risk Appetite Analysis
- 11) Letter of Engagement



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Product Pricing

- | | |
|------------------------------------|------------------------------------|
| 1) Personal Edition (v 1.0.1) | INR 2,500/- (create only one plan) |
| 2) Professional Edition (v 1.0.10) | INR 10,000/- (create 15 plans) |
| 3) Professional Edition (v 1.0.25) | INR 20,000 (create 50 plans) |
| 4) Professional Edition (v 1.0.00) | INR 30,000 (create 100 plans) |
- The above packages shall come with a one year free up gradation and with a one year time limitation in the plans generated by the package, subsequent to which nominal AMC charges shall be levied on a case-to-case basis.
 - The freebies offered with the software are available with all of the versions except Personal Edition.
 - The buyer shall be given a training session on how to use the package.
 - Any additional requirement / customization may be charged separately on case-to-case basis.

Platform and System Requirements

Processor	Pentium 233 Mhz or higher processor; Pentium III recommended
OS	Windows XP or later with 128 MB RAM (recommended)
Disk Space	1 GB.
Monitor	Super VGA (800 x 600) or higher resolution with 256 colors
Others	Microsoft Mouse, Microsoft IntelliMouse®, or compatible pointing device
Printer	Laser / Inkjet, Black & White / Colour (Colour preferred for better quality)

Note None of the Microsoft Office editions in the 2003 release runs on the Microsoft Windows Me, Windows 98, or Windows NT operating systems. If any client computers are currently running one of these operating systems, you must upgrade the operating system before installing Microsoft Office.

Contact Us

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