Planner Partner
A United Advisors Company

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Dear Financial Advisor:

For more than 21 years, I was privileged to be the Chief Operating Officer of a firm that made comprehensive financial planning the cornerstone of its client deliverable. Looking back, I recall the first computer we purchased was a Pertec XL-40 with IFDS financial planning software. It cost us $25,000 in 1984, had less memory than today's $10 calculator and ran barely faster than a Monroe 12 key adding machine! But it was our first step toward building a "production line" for financial plans.

In the intervening years, the firm added office locations, hired financial planning analysts, trained additional support staff, and invested in technology to keep pace with growing plan volume. We developed a clearly defined process, in which all of the steps in the production of the plan were defined and refined to produce a truly excellent financial plan.

The benefits were obvious.

> **First, more output with fewer errors**. Each employee became more competent and faster at what they did, because they were focused on their individual steps in the process.
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> **Second, lower unit costs.** Five levels of employees staffed the operation, from Senior Planner to Data Input. Each worked on those steps that only they could do. The result was a plan production operation that produced high volumes of comprehensive financial plans at a lower unit cost with fewer errors.

Now, PlannerPartner makes the years of continuous improvement and execution success available to you and your firm. We are the outsourcing resource for busy financial advisors who want to offer comprehensive financial plans to their clients but do not have the time or trained staff to do so. Our goal is to provide financial advisors with the highest quality comprehensive financial plans available today by doing all of the back office work necessary to prepare a plan. You meet with your client. We do the back office work. You deliver and implement the finished plan.

The benefits to you?

- You differentiate yourself as an advisor who is "top tier."
- More fee revenue that does not decline when the market declines.
- Annual reviews for your clients that result in ongoing fee revenues.
- A clear picture of the client's entire financial situation to maximize asset acquisition.
- A more in-depth client relationship.
- And most important, more time to focus on building new client relationships and generating more revenue.

For those of you who think that doing more plans means spending more time in front of a computer, call us. With PlannerPartner, you can have more client-facing time than you thought possible, while providing your clients with the high quality planning they expect and deserve.

Sincerely,

Philip K. Selden
President