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## MoneyGuidePro's newest feature encourages client action

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By Editor Test     Mon, Sep 9, 2013

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MoneyGuidePro, the web-based financial planning software, has been enhanced by the addition of Executive Summary, an interactive tool that allows advisors to automate the review of ongoing actions related to a financial plan.

The new tool is designed to help advisors in "more deeply engaging their clients around plan actions. Investors will benefit from a consolidated view of their specific next steps in the financial planning process," the Powhatan, Va.-based firm said in a release.

Clients can select action items from a list of pre-determined tasks, such as:

- Decreasing cash exposure
- Increasing 401(k) contribution
- Purchasing additional insurance
- Refinancing a mortgage
- Updating an estate plan

Action items can have a status and completion date based on a household view of the plan. Investors can access Executive Summary in a view-only format via their MoneyGuidePro Snapshot, allowing them to see what items they must complete as well as their status. Executive Summary can be accessed through any device with a browser.

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