<table>
<thead>
<tr>
<th>Brief Description</th>
<th>ASI goalgamiPro</th>
<th>eMoney</th>
<th>Envision (Available with FCC)</th>
<th>MasterPlan</th>
<th>MoneyGuidePro</th>
<th>NaviPro</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>goalgamiPro</em> was developed to meet the need of advisors looking for an alternative to the comprehensive 70-page financial plan by providing a streamlined process to profile clients and generate modular one-page client-focused reports. _ The tool is a perfect fit for advisors that are looking for a quick assessment tool with concise output to augment quarterly/semi-annual/annual investment reviews – goalgamiPro plans can be created in less than 10 minutes. _</td>
<td><em>14 day free trial thereafter $495/year</em></td>
<td>Advisors license fee is $540/month for unlimited use</td>
<td>N/A</td>
<td>Software: $745 for Stand-alone, $945 for Network. Annual Maintenance: Stand-alone $500. Network: $600. Report Services (using software on your behalf) priced hourly or by report</td>
<td>Sole Practitioner $1295/year EZ Office - Call for Price EZ Office Enterprise - Call for Price</td>
<td>$1600/year</td>
</tr>
<tr>
<td>Discount Price</td>
<td>$445/year</td>
<td>$324/month 360 Pro $216/month 360</td>
<td>$160/month as part of Smartstation/Infomax</td>
<td>10% discount on software purchase for Summit Reps</td>
<td>$995/year pricing for all Summit Reps ($300 discount) Private webinar training quarterly</td>
<td>$125/month</td>
</tr>
<tr>
<td>Integrates with</td>
<td>Redtail</td>
<td>Albridge; Forefield; Microsoft Outlook Morningstar; Redtail</td>
<td>FCC Smartstation</td>
<td>Microsoft Word</td>
<td>Albridge; Forefield; Morningstar; Redtail</td>
<td>NetX360; Redtail, Albridge</td>
</tr>
<tr>
<td>Support</td>
<td>(925) 299-7782</td>
<td>(610) 684-4694</td>
<td>(314) 875-8467</td>
<td>(800) 229-5080</td>
<td>(800) 743-6938 ext. 136</td>
<td>(855) 890-5900</td>
</tr>
<tr>
<td>Contact</td>
<td>Sales &amp; Support</td>
<td>Roger Romero</td>
<td>Dan Hughes</td>
<td>Technical Support</td>
<td>Connor Thomas</td>
<td>Sal Ferrito</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:support@advisorsoftware.com">support@advisorsoftware.com</a></td>
<td><a href="mailto:roger@emoneyadvisor.com">roger@emoneyadvisor.com</a></td>
<td><a href="mailto:daniel.hughes@firstclearing.com">daniel.hughes@firstclearing.com</a></td>
<td><a href="mailto:support@masterplanner.com">support@masterplanner.com</a></td>
<td><a href="mailto:connor@moneyguidepro.com">connor@moneyguidepro.com</a></td>
<td><a href="mailto:sal.ferrito@advicentsolutions.com">sal.ferrito@advicentsolutions.com</a></td>
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**Function:**
- Financial Planning
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- Dan Hughes
- Technical Support
- Connor Thomas
- Sal Ferrito

**Website:**
- www.advisorsoftware.com
- www.emoneyadvisor.com
- www.firstclearing.com/operate/tools/envision
- www.masterplanner.com
- www.moneyguidepro.com
- www.adviscientsolutions.com

**Envision (Available with FCC):**
- FCC Smartstation

**MasterPlan:**

**MoneyGuidePro:**
- Sole Practitioner $1295/year EZ Office - Call for Price EZ Office Enterprise - Call for Price

**NaviPro:**
- $1600/year

相关联系信息:
- 电话: (925) 299-7782
- 电子邮件: support@advisorsoftware.com
- 网站: www.advisorsoftware.com

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- 网站: www.emoneyadvisor.com

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- 电子邮件: daniel.hughes@firstclearing.com
- 网站: www.firstclearing.com/operate/tools/envision

**MasterPlan:**
- 技术支持: Connor Thomas
- 电子邮件: connor@masterplanner.com
- 网站: www.masterplanner.com

**MoneyGuidePro:**
- 技术支持: Connor Thomas
- 电子邮件: connor@moneyguidepro.com
- 网站: www.moneyguidepro.com

**NaviPro Financial Planning Application – Support the success of every advisor at your firm with a comprehensive solution to everything from simple insurance and goal-funding requirements to ultra-high-net-worth comprehensive plans.**

**Profiles™ Financial Planning Application – Deliver engaging, interactive presentations, uncover deeper client needs and close each sale faster.**