



Setting Goals & Objectives and
sharing with your client for
approval



Hero users C-Fact Finder Express to quickly link a clients objectives and Goals to the reason for advice and it does this by allowing you and the client to prioritize the importance of each event.

To start you need to click on the C-Fact Finder Tab, this will always take you to C-Fact Finder Express option.

Even if you decide to use the advance Fact Finder, the linking of Financial Objectives and Reasons for Advice remain connected



As you move across the Tabs Express will automatically save any work that you have done.
Within the field box is a drop down menu

Financial Objectives

Client

TYPE:

PRIORITY:

SHORT TERM

MEDIUM TERM

LONG TERM



You will see that you have two tabs, TYPE and PRIORITY
Type covers off the different types of objectives one could use

You can select;

- General
- Debt Management
- Estate Planning
- Investments
- Retirement
- Risk Cover
- Superannuation



Client

Short Term Financial Objectives

- MEDIUM PRIORITY:** Reduce Debt
- HIGH PRIORITY:** Collate all Super funds into one

REASONS FOR ADVICE

Enter Text

Medium Term Financial Objectives

- MEDIUM PRIORITY:** Create saving account
- HIGH PRIORITY:** Had better investments within your super

REASONS FOR ADVICE

Enter Text

Long Term Financial Objectives

- MEDIUM PRIORITY:** Have passive income
- HIGH PRIORITY:** Retire comfortably

REASONS FOR ADVICE

Enter Text

You then set the Priority for each selection either as a whole or individually

Low

Medium

High

Extreme

When you then click on the Reason for Advice Tab, these details are carried through.

You will notice that each section has been grouped together, all Short Term goals regardless of the subject matter are group and this continues regardless how many items you have.

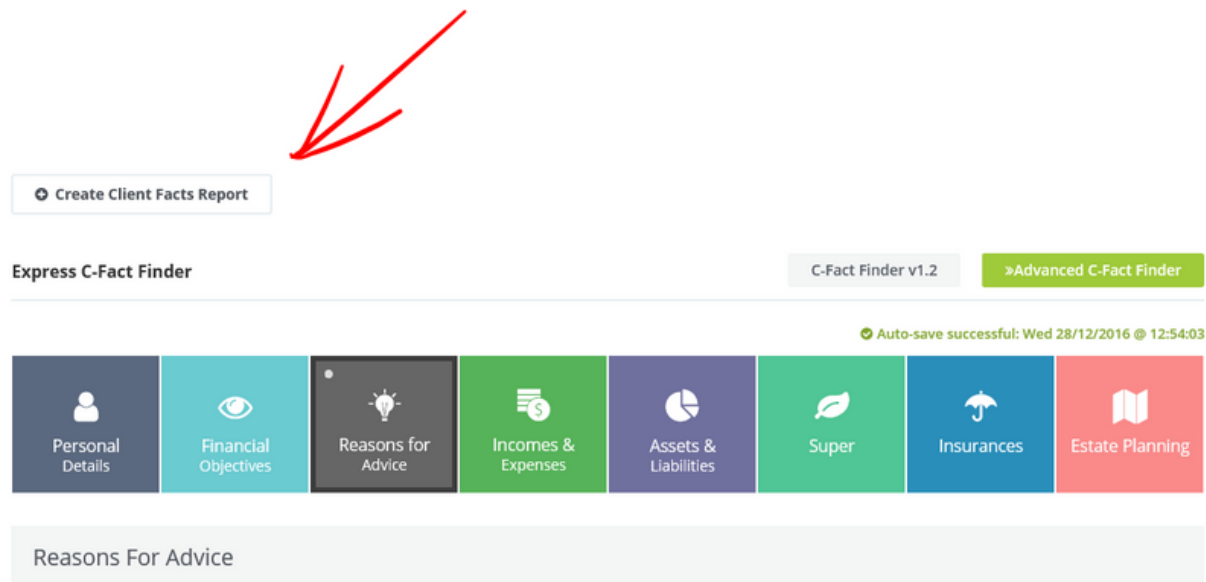
Each group is then highlighted by the level of priority set by the client and adviser.



Once you have completed the Fact Finder you may wish to store or send a secure copy of the completed fact finder to your client.

This can be achieved within one click.

To share or store a copy of your completed Fact Finder simply





When you click open the Create Client Facts report you are presented with a screen whereby you can give the file a name and discription

+ Create Client Facts Report

Select Your C-Fact Finder Template

TEMPLATE

FILE NAME

DESCRIPTION

+ Create Report**✕ Close**



When saving you can select the type of template that you are using, it can be the standard Hero template or one that has been designed by you or your AFSL to use.

+ Create Client Facts Report

Select Your C-Fact Finder Template

TEMPLATE

-Select-

Standard Client Profile Template

FILE NAME

e.g my_file_name

DESCRIPTION

e.g my client file

+ Create Report

✕ Close



If you have set-up your DocuSign account within Hero you are able to send a secure copy of the fact finder to your client and obtain confirmation of acceptance of the client and start to provide advice .

+ Create Client Facts Report

Select Your C-Fact Finder Template

TEMPLATE

Standard Client Profil ▼

FILE NAME

Dan Fintech

DESCRIPTION

Copy of fact finder sent to client via Docusign for completion

+ Create Report

PROGRESS

⚙ Creating Fact Finder...

✕ Close



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