hero™

Ultimate Advice Software

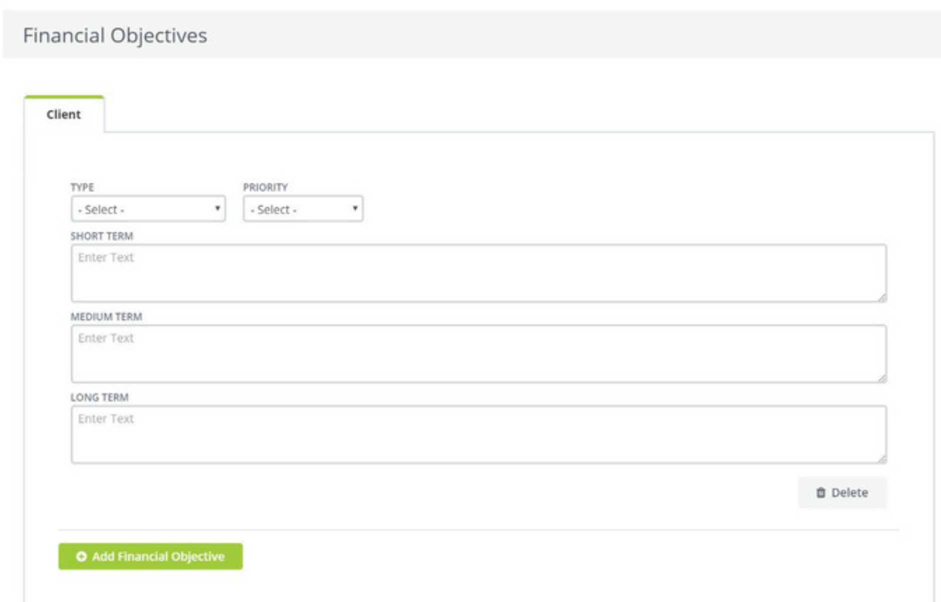
Setting Goals & Objectives and sharing with your client for approval

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



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

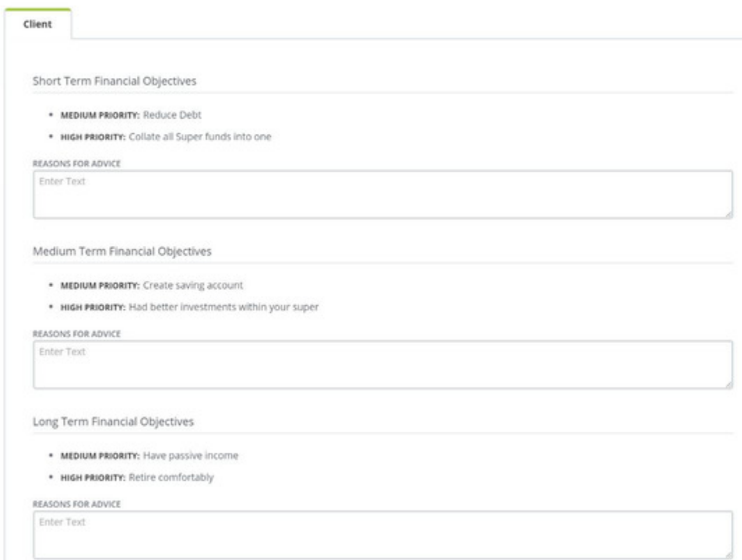
Estate Planning

Investments

Retirement

Risk Cover

Superannuation



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

Low

Medium

High

Extreme

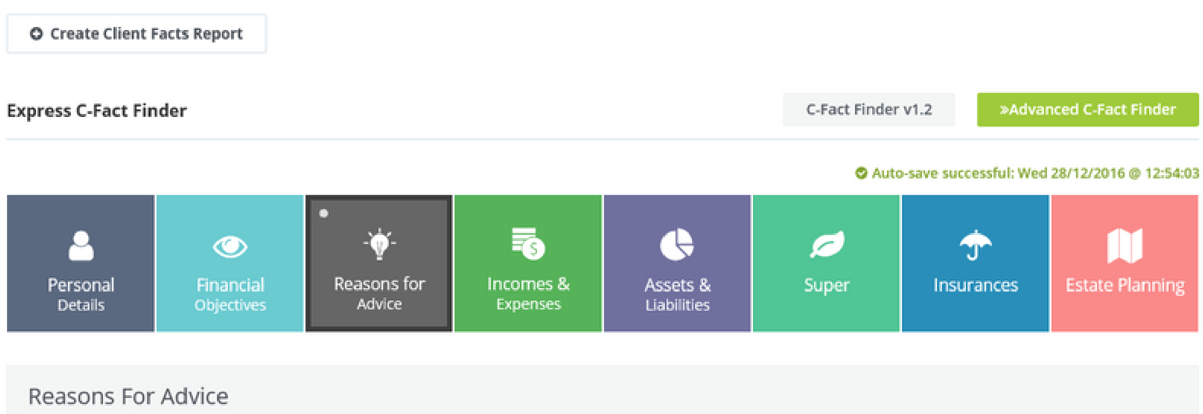
When you then click on the Reason for Advice Tab, these details are carried through.

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

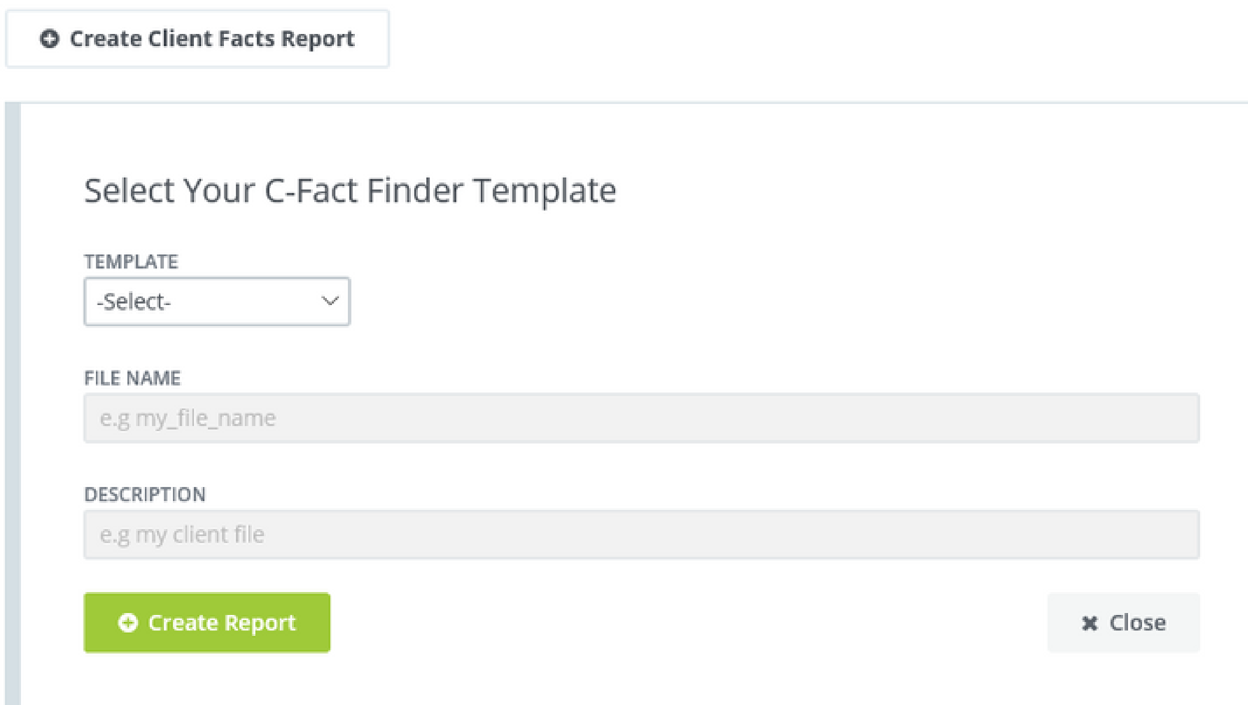
Each group is then highlighted by the level of priority set by the client and adviser.

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.

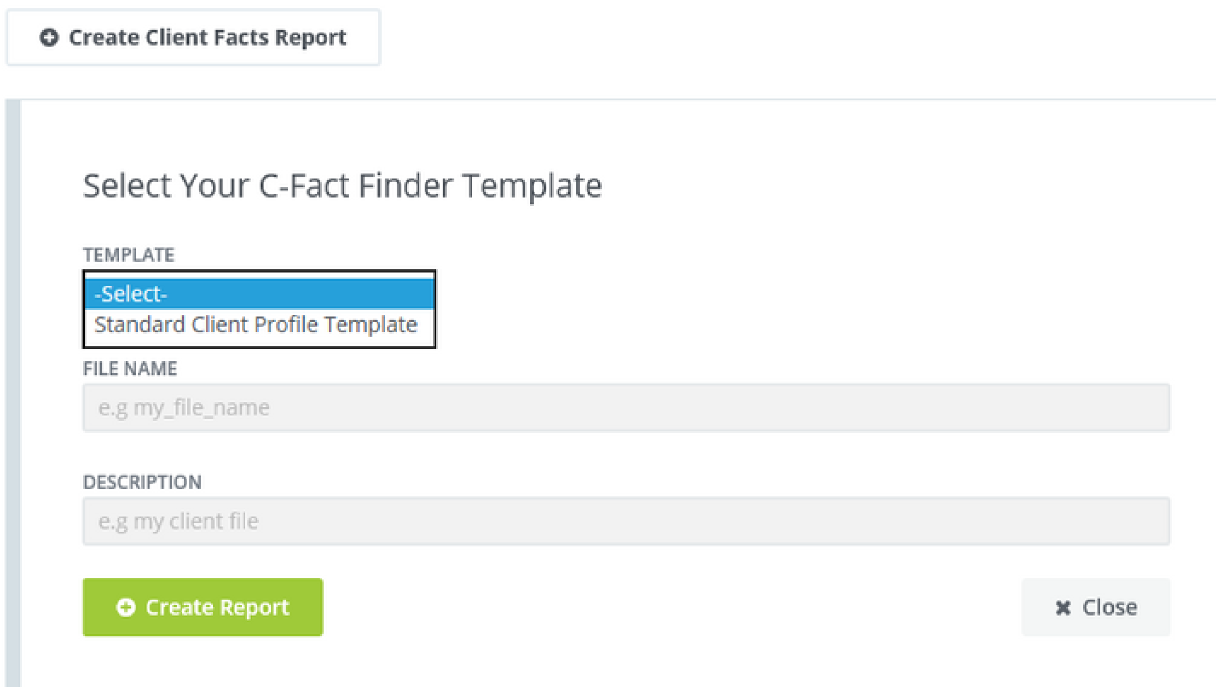
To share or store a copy of your completed Fact Finder simply



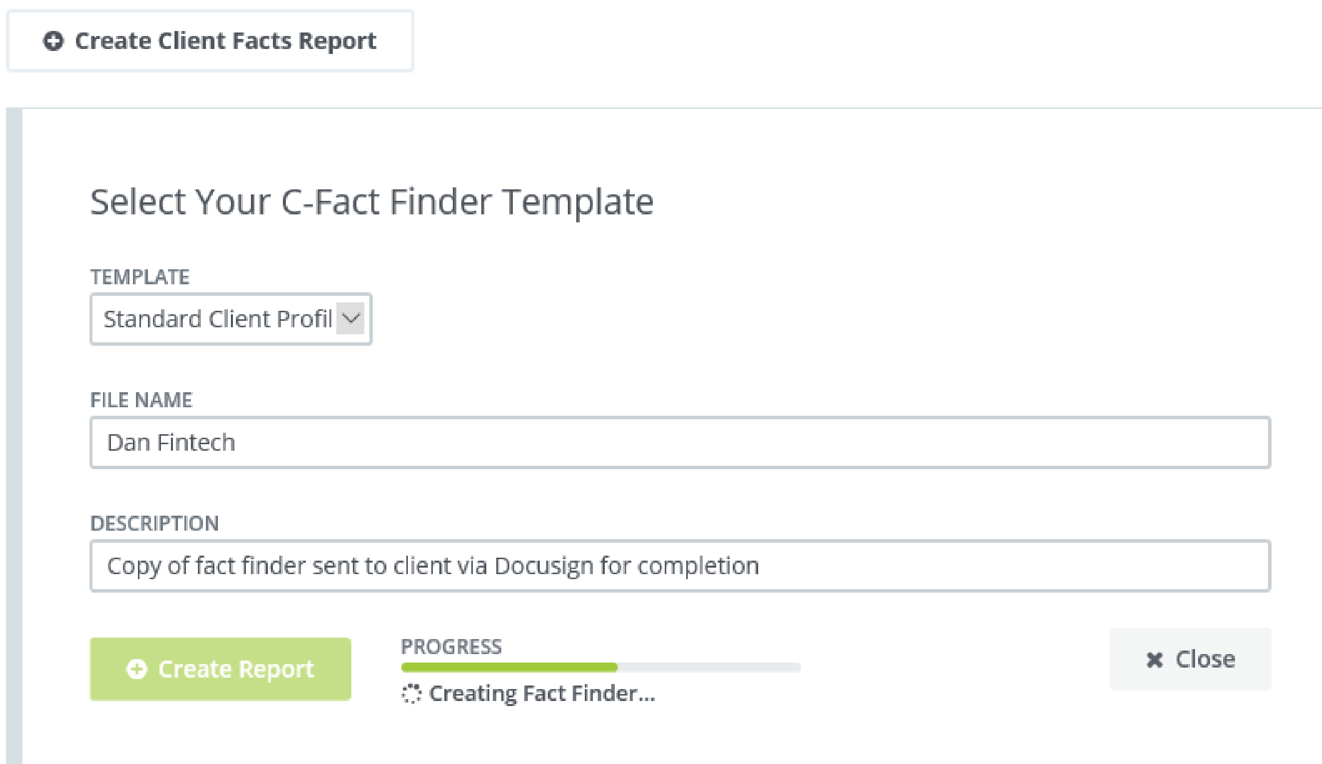
When you click open the Create Client Facts report you are presented with a screen whereby you can give the file a name and discription



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.



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 .



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www.herosoftware.online