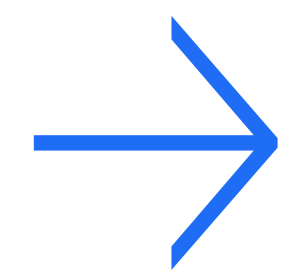




START SAVING MONEY WITH XY PLANNING NETWORK IN JUST 1-3 BUSINESS DAYS



	DESCRIPTION	RETAIL PRICE	MEMBER PRICE	ANNUAL SAVINGS WITH XYPN	HOW TO TRANSFER AN EXISTING ACCOUNT	ELIGIBILITY TO TRANSFER ACCOUNT	TIME TO INITIATE TRANSFER	TIME TO PROCESS
eMoney	Financial planning software	\$324/MO	\$225/MO	\$1,188		UPON JOINING XYPN	LESS THAN 5 MINUTES	1-3 BUSINESS DAYS
PreciseFP	Automated data gathering	\$60/MO	\$30/MO	\$360				
Wealthbox Basic	CRM	\$35/MO	\$0	\$420				
Wealthbox Pro	CRM	\$49/MO	\$11.90/MO	\$445.20				
fpPathfinder	Financial planning flowcharts	\$99/MO	\$0	\$1,188				
AdvicePay	Payment processor	\$50/MO	\$0	\$600				
Capitect (UP TO 20 HH)	Performance reporting	\$125/MO (UP TO 10 HH)	\$0	\$1,500				
Capitect (UP TO 50 HH)	Performance reporting	\$175/MO	\$75/MO	\$1,200				
Capitect (UNLIMITED HH)	Performance reporting	\$300/MO	\$200/MO	\$1,200				
DataPoints	Financial perspective software	\$159/MO	\$59/MO	\$1,200				
RightCapital	Financial planning software	\$125/MO	\$0	\$1,500				
NAPFA*	National Association of Personal Financial Advisors	\$666/YR	\$0	\$666		UPON RENEWAL		
FinaMetrica**	Risk profiling & risk tolerance	\$82.50/MO	\$50/MO	\$390				
MoneyGuidePro	Financial planning software	\$1295/YR	\$80/MO	\$335				
Smart RIA	Compliance task management	\$49/MO	\$0	\$588				
Orion***	Portfolio reporting software	\$15,000/YR	\$5,500/YR + PER-ACCOUNT PRICING	\$9,500				

KEY:

- Submit a short form
- Notify via email

*First month of XYPN membership free if NAPFA was renewed within 30 days of joining XYPN
 **Eligible for immediate transfer if FinaMetrica contract is less than 2 months old
 ***Early transfer possible with termination fee