



START SAVING MONEY
with XYPN in
just 3 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/YR	\$0	\$99				
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		
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:

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*First month of XYPN membership free if NAPFA was renewed within 30 days of joining XYPN

**Early transfer possible with termination fee