VisionWorks Introduction Video Text

This video will guide you through how VisionWorks, our next-generation life-planning software, can take your financial-planning business to the highest level.

VisionWorks will differentiate you from other advisors, deliver planning excellence, and ensure that you exceed your high-value clients' expectations.

But unlike "one-size-fits-all" software, VisionWorks is scalable and flexible. It's adaptable to the needs of your business *and* diverse clients. You can create high-quality retirement plans through to detailed financial or life plans—and everything in between.

How does VisionWorks do this?

First, virtually all other planning software uses a static database. It's easy to recognize this kind of software because, when you're asked to enter data, there's a field to complete. For example, there might be a field for salary or insurance premiums.

But the problem with static software is that you *can't* change entries over time. Why is this so important? Static software forces clients to fit into its mould. Yet every client is unique.

VisionWorks uses a dynamic database that enables you to reflect your clients' real-life circumstances and life path changes over time.

Because of this dynamic approach, VisionWorks moulds its entries to your client's dreams—you model *their* vision, *their* way. Clients see their changing wants clearly reflected in the accurate, dynamic plan.

For example, clients may want to spend a lot more time travelling when they retire. But it's unlikely that they'll still be taking as many vacations when they're 85 or 90. VisionWorks can dynamically adjust for this kind of life change.

Or maybe your client wants to move to a different province. VisionWorks will apply the correct provincial income taxes, regardless of the number of moves.

Or let's say your client is a young doctor, just starting on their career, who expects to make much more in 5 years. VisionWorks can accurately model that change.

Second, VisionWorks is complete in its modelling capabilities. For example, consider clients who have a disabled child. That child's well-being is the most important priority for them and so they've established an RDSP. VisionWorks can include it in their plan.

The ability to reflect real-life changes over time and completeness are the foundation for clients' belief in output. If something that clients feel is important isn't entered correctly or is missing, they'll project that inaccuracy onto the rest of the plan. And without belief, clients will be reluctant to act.

Third, VisionWorks is the only software that integrates the terms of wills into the financial forecast. Among middle-age Canadian couples, the national divorce rate now stands at about 48%. Many of your clients are in second marriages and have blended families. So, it's highly likely that some assets will go to children from a previous marriage, which could have a significant impact on the financial well-being of the surviving partner. For these clients, if wills aren't integrated into the financial forecast, a plan could be anywhere from a little to very misleading.

Also, your wealthy clients will be OK in retirement. For them, uncovering estate issues is the true value-add. To do this, planning software *must* integrate the terms of wills into the financial forecast. Only VisionWorks can do this accurately.

What about reports? They need to be distinctive for you to differentiate yourself from other advisors. Your VisionWorks licence includes the Presentation Builder software, which lets you brand the built-in reports you give to clients.

You can also create a branded PowerPoint presentation and a branded Word document.

And you can present output in Real Time mode, which helps you plan collaboratively with clients.

Ultimately, though, there is no “The Plan.” There are only clients’ wants in life and financial resources at a moment in time. VisionWorks plans help clients align their actions with those wants.

VisionWorks Helps Your Clients Master Change

The true purpose of planning is to help clients master change. And the only way to master change is to use realistic life-planning software that acts as a “practice field” for actual life. VisionWorks enables you to help clients test their options and assumptions so that they can see the long-term impact of them and then make the most informed decisions possible.

By helping clients master change, you position yourself as their irreplaceable financial guide.

Static planning software is obsolete. To take your financial-planning business to the highest level, you need to embrace next-generation, dynamic life-planning software—VisionWorks.

You can review specific VisionWorks features in more detail by clicking on the Learn More button and playing the VisionWorks Learn More video. Or book a demo. We’d be happy to show you more of VisionWorks’ incredible features.