RETIREMAP OVERVIEW

Your Planning Partner

RetireMap®
ADVISER'S MISSING LINK

RetireMap® makes life easier for Advisers

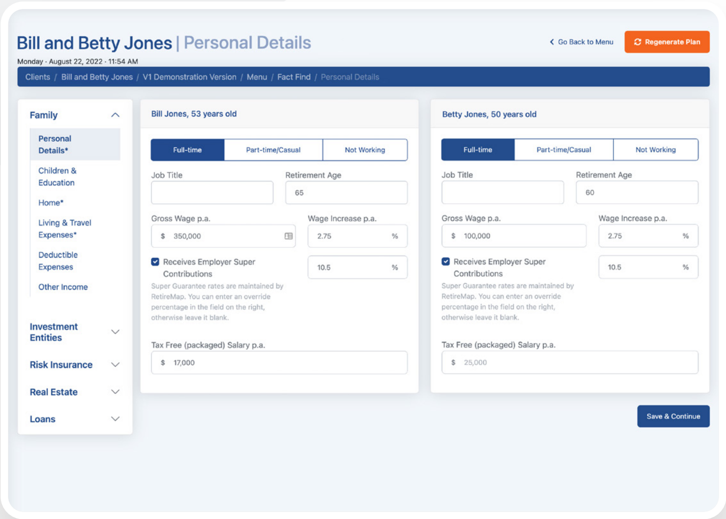
RetireMap® is a powerful, multifaceted planning tool that substantially improves Adviser productivity. Using all-new patented technology, **RetireMap®** utilises advanced algorithms, templates, and automation to streamline the process making planning easier, faster, and more enjoyable for both Adviser and client.

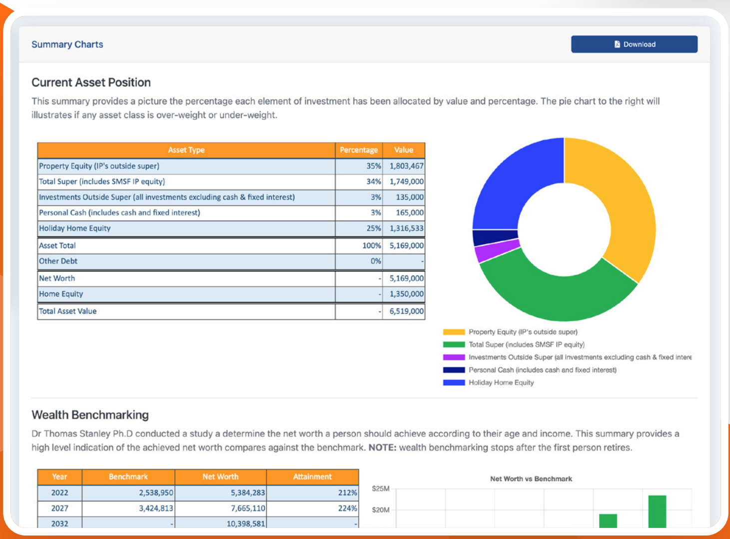
"Simple to use, Fast to master."

RetireMap® Improves Adviser productivity by 66%*

Complete a fast, efficient & intuitive Fact Find in under **45 mins,** and auto-generate instant real-time analysis & reports with minimal fuss.

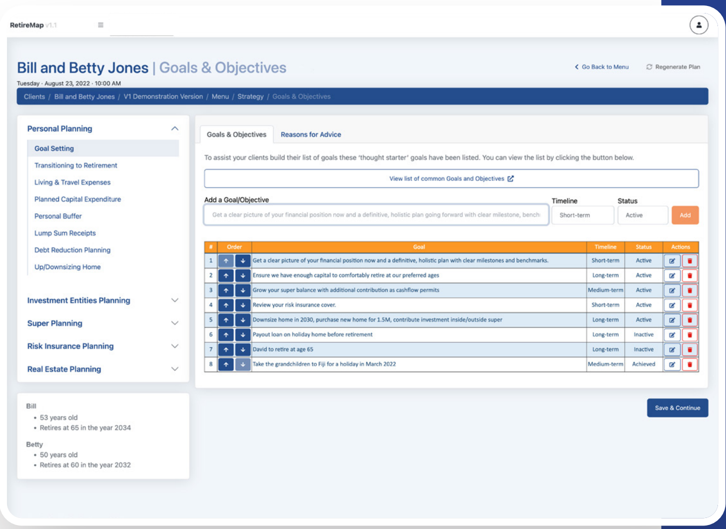
*source: **KPMG study.**





Complex, time consuming calculations are automated

RetireMap® instantly completes a range of traditionally time-consuming calculations, such as CGT, PPR up or downsizing, business sale/s, 'total cost of children' effect, deductible expenses, long-term cashflow, planning and more.

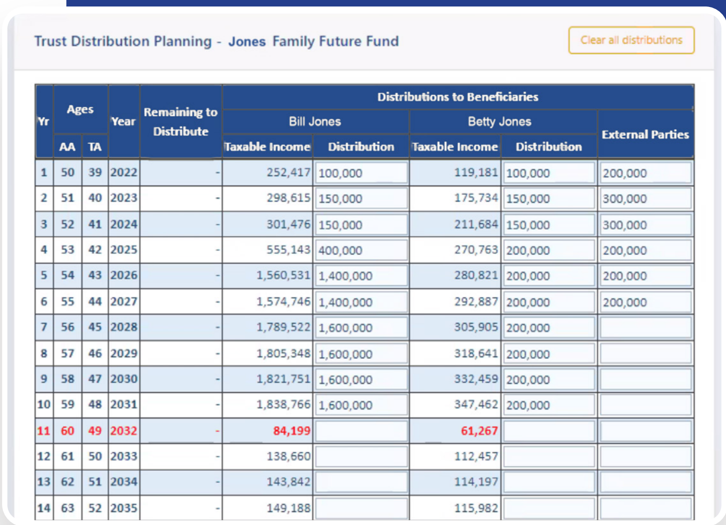


Sophisticated Adviser aids and tools to advance client 'best interest' duty

RetireMap® features a range of patented tools to heighten client engagement and Adviser productivity.

Joint Adviser/Client Goal Setting prompts, the Future CapEx Planning System and Transition to Retirement Planning System are all easily completed within minutes.

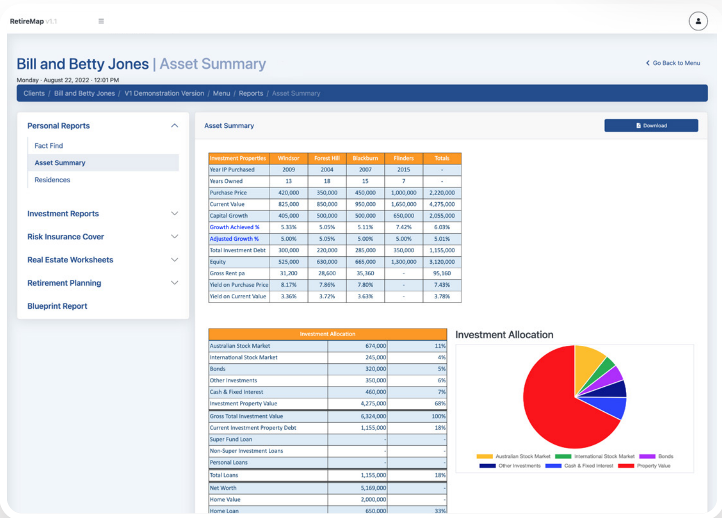
RetireMap's integrated Reason for Advice & Goal Setting System allows the Adviser and client to set, prioritise and track the attainment of each goal.



Yr	Ages AA	Ages TA	Year	Remaining to Distribute	Bill Jones Taxable Income	Bill Jones Distribution	Betty Jones Taxable Income	Betty Jones Distribution	External Parties
1	50	39	2022	-	252,417	100,000	119,181	100,000	200,000
2	51	40	2023	-	298,615	150,000	175,734	150,000	300,000
3	52	41	2024	-	301,476	150,000	211,684	150,000	300,000
4	53	42	2025	-	555,143	400,000	270,763	200,000	200,000
5	54	43	2026	-	1,560,531	1,400,000	280,821	200,000	200,000
6	55	44	2027	-	1,574,746	1,400,000	292,887	200,000	200,000
7	56	45	2028	-	1,789,522	1,600,000	305,905	200,000	
8	57	46	2029	-	1,805,348	1,600,000	318,641	200,000	
9	58	47	2030	-	1,821,751	1,600,000	332,459	200,000	
10	59	48	2031	-	1,838,766	1,600,000	347,462	200,000	
11	60	49	2032	-	84,199		61,267		
12	61	50	2033	-	138,660		112,457		
13	62	51	2034	-	143,842		114,197		
14	63	52	2035	-	149,188		115,982		

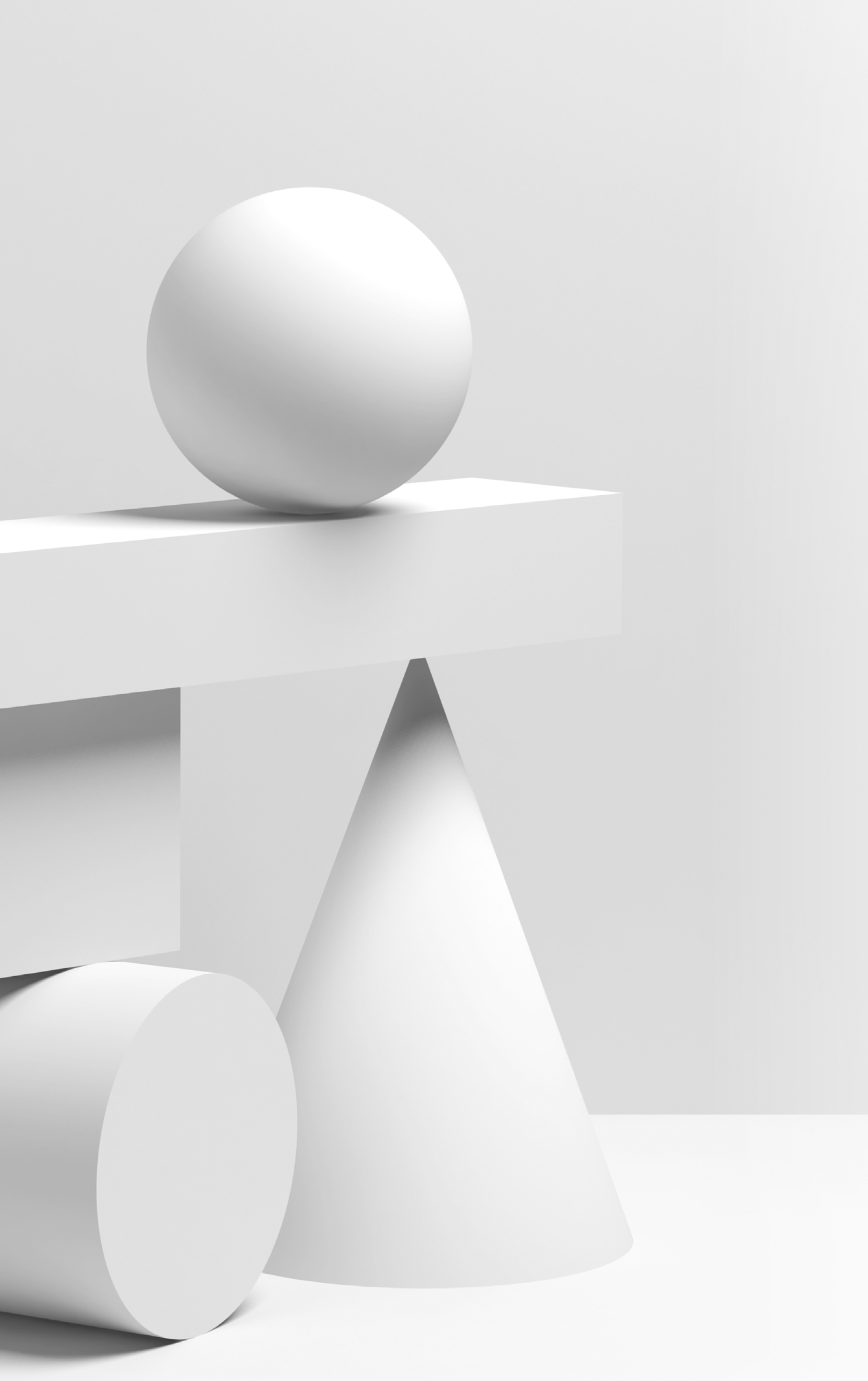
Tax planning is fast, efficient and easy even for the most sophisticated of clients

RetireMap's all new integrated 'Entities' module handles dividends, distributions, investments and tax liabilities for Trusts, including bucket company strategies, businesses and Pty Ltd companies in minutes.



RetireMap® provides more detail to assist Advisers design better plans

A comprehensive range of 'granular' reports provides the Adviser with the detail to explain their clients' true current & projected financial position. Reports are presented in a flowing, client friendly format, making it easy to understand.



Book a no-obligation Demonstration today, by visiting **retiremap.com.au**

For more information, email us or visit our website.

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