

## WHY SHOULD YOU OFFER PROFESSIONAL PLANNING COORDINATION SERVICES™?

- 1 ELEVATE & DIFFERENTIATE YOUR PRACTICE
- 2 YOUR BEST CLIENTS NEED AND WANT A PROFESSIONAL PLANNING COORDINATOR™ AND THEY PREFER TO USE THEIR MOST TRUSTED ADVISOR FOR THIS SERVICE. (SEE THE ARTICLE IN THE TRUSTS AND ESTATES JOURNAL NOVEMBER 2011 ISSUE TITLED “THE QUARTERBACK DILEMMA”).
- 3 THE PPC SERVICE™ IS AN ADMINISTRATIVE SERVICE, WHICH MARKEDLY REDUCES YOUR PROFESSIONAL LIABILITY IN DELIVERING THE SERVICE.
- 4 DELIVERING PPC SERVICES™ TO YOUR BEST CLIENTS ENHANCES YOUR PERSONAL AND PROFESSIONAL RELATIONSHIP AND CONTINUES TO PROMOTE YOU AS THE CLIENT’S AND THEIR FAMILY’S “LEAD ADVISOR”.
- 5 YOUR TIME COMMITMENT IS MINIMAL, BECAUSE PPCS PROVIDES:
  - ✓ TURNKEY PLANNING MEETING AGENDAS
  - ✓ SECURE CLIENT SPECIFIC WEB PORTAL WHICH CONTAINS CLIENT’S:
    - SCANNED DOCUMENTS IN LICENSEE’S CLIENT’S SMARTVAULT
    - DAILY TRACKING OF CLIENT’S INVESTMENT PORTFOLIO
    - FINANCIAL PLAN (IF AVAILABLE)
    - INVESTMENT PERFORMANCE ON-DEMAND
    - TAX RETURNS
  - ✓ FORM LETTERS FOR LICENSEE TO SEND TO CLIENT AND CLIENT’S ADVISORS
  - ✓ EXTENSIVE PPC SERVICES LIBRARY OF FORMS
  - ✓ PPC SERVICES PROFESSIONALLY DESIGNED MARKETING PROGRAMS
- 6 GENERATE PREMIUM REPETITIVE HOURLY INCOME PROVIDING PPC SERVICES TO YOUR BEST CLIENTS, WHILE GIVING THEM WHAT THEY NEED AND WANT, WHICH IS YOU BEING THEIR PROFESSIONAL PLANNING COORDINATOR.

## Professional Planning Coordination Services™

### Offers Three License Types

TO OFFER PPC SERVICES™, YOU NEED TO PURCHASE ONE OF THE FOLLOWING THREE LICENSES FOR THE COUNTY WHERE YOUR OFFICE IS LOCATED. THERE ARE THREE TYPES OF LICENSES AVAILABLE:

**TYPE I:** Non Exclusive Territorially Restricted License.

**TYPE II<sup>(1)</sup>:** Non Exclusive Territorially Restricted License with a “Right of First Refusal” and an “Option” to Convert to a Type III Exclusive License.

**TYPE III<sup>(1)</sup>:** An Exclusive Territorially Restricted License

<sup>(1)</sup> Not available in some larger counties in your state

## PROFESSIONAL PLANNING COORDINATION SERVICES, LLC

ELEVATE & DIFFERENTIATE YOUR CLIENT SERVICE OFFERINGS™

for

INDIVIDUAL, FAMILY, BUSINESS,  
NON-PROFIT, TRUST AND  
ESTATE ADMINISTRATION CLIENTS

[www.ProfessionalCoordinator.com](http://www.ProfessionalCoordinator.com)

To learn more about  
Professional Planning Coordination Services™

Visit our Website

[www.ProfessionalCoordinator.com](http://www.ProfessionalCoordinator.com)

Email

Tonya Bowersock  
Director of Marketing-Licensee Sales & Services

[Admin@ProfessionalCoordinator.com](mailto:Admin@ProfessionalCoordinator.com)

Call

1.866.998.2737 Ext. 5

to schedule a Webinar Presentation

or

a Meeting with a PPCS Representative

Professional Planning Coordination Services, LLC

YOU MARKET

~

WE PREPARE

~

YOU DELIVER

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**MAKE A REAL DIFFERENCE IN YOUR BEST CLIENTS' LIVES BY DELIVERING PROFESSIONAL PLANNING COORDINATION SERVICES™ (“PPC SERVICES™”).**

## **WE CAN SHOW YOU HOW**

The PPC Service™ is a sophisticated web-based planning coordination service that automatically raises your status from being just one of your client’s advisors to being your client’s “Lead Advisor”. This is accomplished by your client retaining you as their Professional Planning Coordinator™ (“PPC™”). PPC Services™ are designed to meet the ever increasing demands of your best individual, family, business, non-profit, trust and estate administration clients for professional planning coordination assistance in:

- ✓ Organizing and uploading your client’s personal, business and financial documents into your client’s portal.
- ✓ Keeping your client’s data current.
- ✓ Providing 24/7 web access to your client’s personal information, financial information and related documents.
- ✓ Providing a disciplined approach to your client’s planning efforts, as well as the efforts of their advisors.
- ✓ Requiring your client’s advisors to evaluate the planning topics assigned to them and making written observations, judgments and recommendations.
- ✓ Requiring regular planning meetings (i.e. one to four meetings per year) with formal agendas for your clients and your client’s advisors.
- ✓ Following up with your client’s advisors until all of the action items have been completed.



**EXPERIENCE THE Professional Planning Coordination Service™**

# DIFFERENCE

**Professional Planning Coordination Services, LLC IS COMMITTED TO HELPING YOU BECOME YOUR CLIENTS’ “LEAD ADVISOR”, WHILE INCREASING YOUR ANNUAL REPETITIVE INCOME FROM YOUR INDIVIDUAL, FAMILY, BUSINESS, NON-PROFIT, TRUST & ESTATE ADMINISTRATION CLIENTS.**

**YOUR CLIENTS HAVE THE OPTION OF CHOOSING ONE OF SEVEN PPC SERVICES™**

**THREE INFORMAL PPC SERVICES™**

**CLIENT PPC SERVICE “LITE”** - One “Lite” Meeting a Year.

**CLIENT PORTAL PPC SERVICE** - includes Single Sign-On (SSO) for secure access to their:

1. Document Vault
2. Portfolio Asset Tracking and Performance Reporting
3. Financial Plan (prepared by client’s CFP® & if available online)
4. No Meetings Required

**CLIENT PPC SERVICE “LITE” & CLIENT PORTAL PPC SERVICE - COMBINED** - One “Lite” Meeting a Year.

**FOUR FORMAL PPC SERVICES™**  
(\* Includes the Client Portal PPC Service)

**BASIC PPC SERVICE\*** - Designed for clients with a Net Worth under \$3M and/or income of less than \$250K. Requires One (1) Planning Meeting a Year.

**LIFETIME PPC SERVICE\*** - Designed for clients with a Net Worth of \$3M - \$5M and/or income of \$250K-500K. Requires Two (2) Planning Meetings a Year.

**ENHANCED PPC SERVICE\*** - Designed for clients with a Net Worth of \$5M - \$10M and/or income of \$500K-\$1M. Requires Three (3) Planning Meetings a Year.

**COMPREHENSIVE PPC SERVICE\*** - Designed for clients with a Net Worth in excess of \$10M and/or income in excess of \$1M. Requires Four (4) Planning Meetings a Year.