

**NEW PRODUCT
ALERT!**

A SMARTER WAY TO BUILD CLIENT BUDGETS

Designed for Financial
Advisors and Fiduciaries



- Mortgage
- Education
- Credit line
- Credit card
- Home Equi
- Home
- Travel and
- Groceries a
- Amex Line
- Dining Out
- Utilities
- Car Insuran
- Interest on
- LTC insuran

Total

What you provide

- ◆ Client background info
- ◆ Focus categories
- ◆ The last 3 months of bank/credit card statements
- ◆ Online banking export files (QFX files)

**From messy statements to
clear insights, giving you more
time to advise your clients.**

**Ready to simplify your client's
financial picture?**

Contact us today to get started!



What you receive

We thoroughly analyze your client's past spending to create a clear, customized report:

- ◆ Categorized Income/Expense report
- ◆ Detailed insights on focus categories
- ◆ Spending distribution pie chart
- ◆ Full transaction record

\$800

Typical package price.
(Varies based on complexity)



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www.smartdailyservices.com

Trusted by financial professionals since 2017