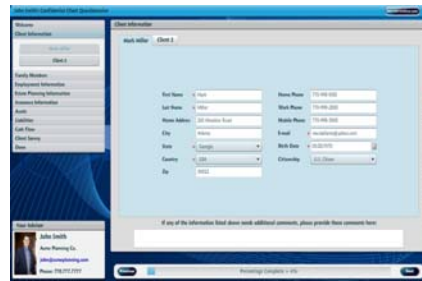




“PreciseFP collects data from the client in the most precise, efficient, user-friendly manner, leaving the planner to do what he gets paid for—financial planning.”

*Don Whalen, CFP  
Co-Founder, Spectrum Input LLC*



Cornerstone Revolutions, Inc. Presents:

**Don Whalen, CFP &  
Co-Founder of Spectrum Input, LLC**

From the Makers of PreciseFP,  
Practice Management Tools for Client Data Collection

Tuesday • August 26th • 10am PDT

Don Whalen hosts a demonstration of PreciseFP, a new online client questionnaire for client data collection. You'll learn about this powerful solution for collecting, processing and storing client information that includes:

- Non-proprietary & Web-based for easy integration with financial planning or portfolio management applications that exchange data using standard data exchange methods (e.g. XML)
- Easily personalized & customizable for company branding & style
- Clean, user-friendly interface to minimize client confusion & optimize client success through dynamic prompting displays
- Replace paper-based questionnaires with a living document that allows for customized client communications
- Help maintain compliance with easy, safe data storage & retrieval

Don Whalen, CFP® is a practicing financial planner and active member of both the FPA and NAPFA. Prior to entering the financial planning profession, Don owned a software and consulting company that specialized in document creation, distribution, archiving, and retrieval. Don's company provided leading-edge document solutions to U.S. and international fortune 500 companies. Upon entering the financial planning profession, it quickly became apparent that the industry hadn't kept pace with some technological advances found at the larger companies he had served in the past. One key area of focus was the process of client data gathering. Don felt that collecting data via paper-based questionnaires didn't make sense from an efficiency standpoint. This prompted Don to partner with a long-time friend and business partner, Sebastian Skwarek, an IT expert who specializes in electronic forms integrations. Together, they created Spectrum Input, LLC and its flagship product PreciseFP.

*Cornerstone Revolutions delivers information you need with monthly [Webinars](#) on topics that are relevant and provide a broad range of useful information for advisors and their practice.*

\*Webinars are free but [pre-registration](#) is required.

For a complete listing of Cornerstone asset management tools, visit [www.poweradvisorstools.com](http://www.poweradvisorstools.com), or call our sales team at 503-968-7202 for additional information. Cornerstone Revolutions, Inc., is a software development firm specializing in applications for financial professionals, located in Portland, Oregon.

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