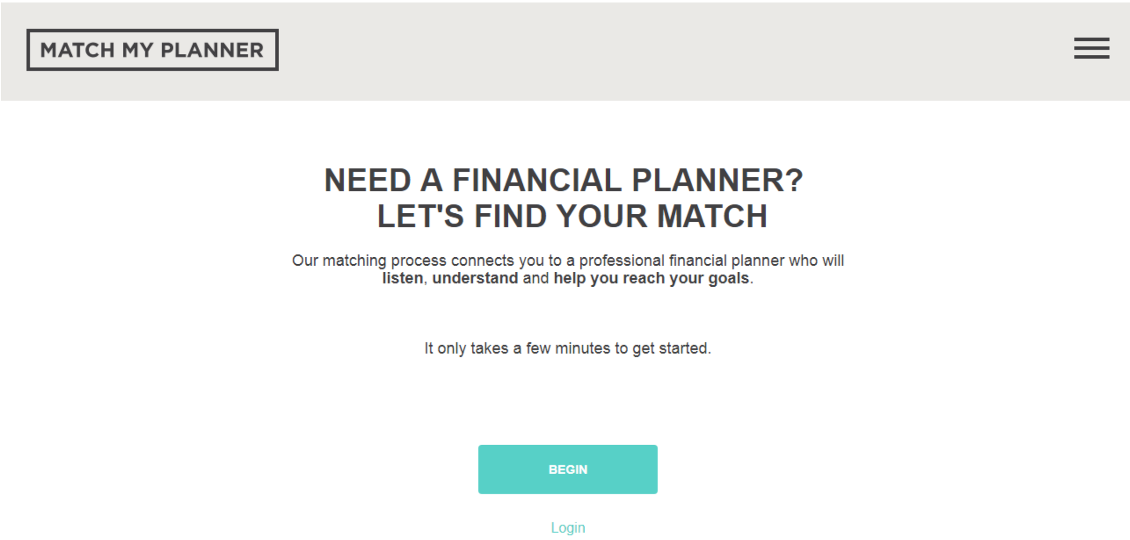
MATCH MY PLANNER TOOL GUIDE

The Match My Planner consumer web tool



The Match My Planner consumer tool is a simple online service that walks the consumer through some questions to discover their:

- Financial goals
- Demographic information (age, marital status and dependents)
- Number of planners they wish to hear from

When a consumer completes their Match My Planner online request, the information is sent out to participating FPA members who have downloaded the FPA Member Match My Planner app on their mobile phone. FPA members will receive a notification on their phone via the app letting them know when a consumer is looking for a financial planner in their geographic location.

Consumers will be notified when an FPA member has sent a message request. They can login to the Match My Planner web tool to view these requests as well as respond to them.

FPA members can view the consumer Match My Planner tool here. Please note this is the testing version of the tool. The real tool is currently live and all submissions will be filtered through our database.

The Match My Planner FPA member app

We've designed a mobile Match My Planner app dedicated to FPA members. Once downloaded, you'll have the chance to view your profile and make any changes. This profile is the same one that's listed on the current Find a Planner tool.

Whenever there's a new consumer looking to connect with a planner in your geographic location, you'll receive a notification on your phone to let you know. Opening up the app will then give you all the details about the consumer and you can decide if this is a lead that you'd like to reach out to. You can respond to their profile with a short message expressing interest in helping the consumer. From there, the consumer can view your reply to them, via their Match My Planner login page, and decide whether to keep the conversation going. If they reply to you again, you'll get another app notification.

The tool operates on a first come-first served basis. The quicker you respond, the greater your chance to connect with a new client. Each consumer Match My Planner request will indicate how many financial planners they like to hear from – whether it's just one or up to five. So if you're interested in connecting, you should send a message back to the consumer as soon as you can to increase your chance of more client responses.

See below some screenshots from within the Match My Planner FPA member app.