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PRESS RELEASE

SpectrumInput, LLC, streamlines financial planning tasks with release of PreciseFP™ digital client questionnaire

Alpharetta, Ga—One of the most crucial yet simplest tasks of the financial planner just took an evolutionary step from paper and pencil to digitized form with the release of PreciseFP™, a Web-based client data-gathering application.

Spectrum Input, LLC, an Alpharetta, Georgia-based company, formally released its flagship product to the financial planning and advising industry today wrapped in a [sterling review](#) from Joel Bruckenstein, columnist with *MorningstarAdvisor* and industry expert on applied technology for financial professionals.

Calling PreciseFP a “promising new practice-management tool”, user rates for PreciseFP have grown 260% since its soft release in early August and the release of Bruckenstein’s review.

Using a virtual advisor dashboard to customize and manage the online questionnaire and a client portal that can be easily accessed through a link provided by the advisor, PreciseFP was specifically designed to address the key barriers that may have kept advisors in the paper/pencil mode longer than practical.

“In an industry flush with Web-based financial planning and portfolio management tools—each one more sophisticated than the last—it seemed odd that such a large percentage of financial professionals were still collecting client data with a paper questionnaire,” observed Don Whalen, CFP®, co-founder of Spectrum Input, LLC, and a practicing comprehensive financial planner. “While some financial planning applications come with their own online questionnaire, it’s typically a proprietary tool that’s available only if you buy the application. We saw no reason why every planner shouldn’t have an efficient way to capture client data and be able to access it for CRM, compliance record keeping, yearly updating, and quarterly reporting.”

Along with co-founder, Sebastian Skwarek, a specialist in electronic forms development and systems integration, the Spectrum Input team targeted client usability as key to making the online product a success. “Ease of use and security are the two biggest concerns when you’re introducing an online questionnaire to clients who have always put pencil to paper to provide their financial history and relevant data,” says Skwarek, “so we focused on an intuitive user interface that guides the client in making logical choices at each data entry point. Security of that data is insured by maintaining the highest standards in encrypted technology that dramatically reduces the risk of identity theft that clients may be concerned about.”

Compatible with financial planning or portfolio management applications that exchange data using standard data exchange methods (e.g. SML), Whalen and Skwarek are running strong out of the gate by tackling integration with two industry heavyweights—Money Tree Software™ and MoneyGuidePro™—both financial planning software applications. Integration with Money Tree was recently completed and is just starting with MoneyGuidePro according to Skwarek, Spectrum Input’s lead for integration processes.

Whalen and Skwarek anticipate a fairly rapid assimilation of PreciseFP into the marketplace. As a longtime active member of both the FPA and NAPFA—two prominent national financial planning organizations—Whalen used his professional network of planners as beta testers for early versions of the product. “Precise FP represents the future of financial planning...,” says one such colleague, Russ Thornton of Thornton Wealth Management. “It provides a consistent system which (helps) improve the client experience and...create more efficient systems within a planner’s business.”

About: Spectrum Input, LLC, is based in Alpharetta, Georgia, and is dedicated to streamlining business practices for the financial planning and advising professional. Visit <http://www.spectruminput.com/index.html> for complete product information.