CPT Menu

Help with Clients:

1. **Present in a Meeting**
    - **a.** Build plans and present them in meeting as the "Tax Expert" or "Orion Planning Expert".
2. **Build Analysis for Advisor and/or Client**
    - **a.** Send in-depth analysis and PDFs to the advisor to then copy or forward on to the client so the advisor remains the only point of contact.
    - **b.** Create and generate PDF reports from planning software and send to the client with in-depth analysis and details on different scenarios and which ones we recommend.
    - **c.** Only send the PDF report or other educational materials to the client.
3. **In Person Catch Up**
    - **a.** Build the plan or run the requested analysis and schedule 10-15 mins to present information to the Advisor prior to their meeting with the client so they can present it by themselves in the meeting.
4. **Second Set of Eyes**
    - **a.** Review or talk through planning concepts, tools, or software to get a second opinion or have someone to bounce ideas off of.
5. **CPA Project**
    - **a.** Ad hoc updates or refreshes for clients in the CPA project prior to their meeting with the CPA.

Help with Prospecting:

1. **Presentations**
    - **a.** Create a custom slide or graphic for a specific financial planning issue or a screenshot of a software tool showing a specific case.
2. **New Client Visuals**
    - **a.** Create, source, or approve new client visuals that can be used in the 1st or 2nd appointments or for existing clients.

Training:

1. **Large Group Trainings**
    - **a.** Monday Morning meetings
        - **i.** We curate these topics based on your feedback and what you want to train on.
2. **Smaller Group Trainings**
    - **a.** New Advisor Trainings
3. **Individual Deep Dives**
    - **a.** Schedule one-on-one time to walk through a tool or software and how to use and present them in meetings.

Software Tools:

1. **Holistiplan**
    a. Multi-Year Roth Conversion Analysis Buildout
        i. Run multiple scenarios and present the optimal strategy.
    b. Scenario Analysis
    c. Generate Tax Report
    d. DAF Explainer
    e. QCD
    f. One-Year Roth Analysis
        i. How much should I convert this year?
    g. Questions/One Off Situations to Model
        i. Ex. ACA Premiums as a result of Roth Conversions.
2. **Orion Planning**
    a. Full Financial Plan Buildout
    b. Net Worth Statement
    c. Running Monte Carlo with 'What Ifs'
    d. Generating Custom Reports
    e. Questions
        i. Does this look right?
        ii. How do I model this?
        iii. Go between for Advisor and Orion Planning Support
3. **Nitrogen**
    a. Retirement Map
    b. Investment Proposal?

Excel Tools:

1. **Basic Tax Strategy**
    a. Run multiple scenarios
    b. Determine room for Roth Conversions
    c. Taxation of Social Security
        i. IRMAA limits
        ii. 5 Torpedos (SS, IRMAA, CG, Senior Deduction, Medicare/NIIT)
2. **Cash Flow Pro**
    a. Full Buildout
    b. Cash Flow Planning
    c. Social Security Dashboard
    d. Withdrawl Planning
    e. Ex-Spouse Planning

3. **NPV Tool**
    a. Business Valuation
    b. Sell or Rent my home
    c. Pension Combination (Lump Sum from one to add to the other - Find Breakeven)
    e. NPV of ACA premiums by doing Roth Conversions
        i. Use in conjunction with Holistiplan
4. **Pension Lump Sum vs. Monthly**
    a. Full buildout
5. **Net Worth Statement**
    a. Full buildout