



PlanGuru and Your Practice

There is a huge demand for budgeting, planning and forecasting services among companies of all shapes and sizes. Thousands of financial professionals are reaching these clients by leveraging PlanGuru software and the PlanGuru Professional Advisor Program. Our users are able to profitably deliver budgeting and planning services at a price that makes sense for their clients.

Value Proposition:

PlanGuru's Core Function

PlanGuru enables its users to build forward-looking financial analysis in a fraction of the time it takes in spreadsheets. With an integrated income statement, balance sheet and statement of cash flows, PlanGuru provides over 20 powerful forecasting methods which allow you to project for up to 10 years. These include intelligent turn-key methods, plus the ability to build customized equations including business drivers. Whether your client needs a simple forecast for a bank loan or is implementing a rigorous monthly budgeting process, you will produce a more accurate analysis in less time.

Add Value Immediately

Our import tools and integrated framework eliminates the frustrating and labor intensive process of building the model. Removing this barrier enables you to cut straight to value-add discussions of "how can we get better". Get your smaller clients excited by completely bypassing the sales process and jumping right in. For larger clients, you do not need to be a computer programmer, or spend large amounts of consulting dollars, to develop intelligent hierarchical systems.

Value Realization

PlanGuru will enable you to fill the missing hole in your client's decision making process with an effective budgeting process or strategic plan. With PlanGuru, budgeting/ forecasting/ planning is no longer just a niche service for your most motivated clients (with deep pockets). You can now provide these services to the majority of your clients at a price that you are both very happy with.

Who is using PlanGuru?

Financial Professionals

- › CPAs: From sole practitioners to firms with dozens of accountants
- › Financial Consulting/ Part-time CFOs
- › Transaction Based Business Advisory Services/ Middle Market Investment Banks

Internal use at Businesses

- › From Auto-Body shops to Large Corporations with hundreds of divisions

Operational Budget/Forecast

Organizations construct their budget at the beginning of the year and perform ongoing performance measurement with PlanGuru reports and our Advanced Reporting Add-in.

Budget vs. Actual Comparison, Rolling Forecasts

Strategic Planning

Help leadership get a better understanding of long term risks & opportunities, yielding better strategic decisions. Done for both business reasons and business continuation planning.

Sensitivity/scenario analysis, break even, business valuation

External Estimate

When an organization needs to demonstrate their estimated financial future to a Lender, Investor, or Board of Directors.

These projects tend to be the most simple

Decision Analysis

Many organizations make large investments, acquisitions, or bid on large contracts. These decisions need to be evaluated in an organized and effective way.

Complete any financial projection in a fraction of the time.

PlanGuru is a tool for any type of forward looking financial analysis: that may be a 10 year strategic plan or a detailed multi-departmental (or location) operating budget. Small and medium sized businesses use PlanGuru instead of toiling away for weeks in Excel or spending 10x the cost of PlanGuru on overly-complex systems.

Have a Model in Minutes – Construct a fully integrated analysis (income statement, balance sheet, statement of cash flows) that is specifically tailored to any company in a matter of minutes using our import tools.

QuickBooks & Excel Compatibility -



Importing historical data and actual results into PlanGuru is simple with the Excel and QuickBooks import tools. PlanGuru gives you the ability to link lines in your budget to Excel or export any part of your analysis to Excel. The Advanced Reporting Add-in enables you to build any customized report, and refresh the data with the latest values out of PlanGuru with a click of the mouse. With these features, PlanGuru combines the benefits of a structured model (with specialized tools) and the infinite flexibility of Excel.

Refinement of Analysis – Once the model is constructed, use PlanGuru's extensive toolkit to forecast any line on your income statement and balance sheet (statement of cash flow is automatically generated by PlanGuru).

- › Over 20 specialized forecasting methodologies for each area of your income statement and balance sheet
- › Create supporting schedules and non-financial items to drive the forecast
- › Build a live link to an Excel file

Reporting & Analysis Tools – PlanGuru automatically performs analysis that can take hours in an Excel spreadsheet. This includes both your forecast and when you are doing budget vs. actual comparisons.

- › Customizable reports to meet all aspects of a budgeting and planning process
- › Business Valuation
- › Engagement tools to help you meet AICPA guidelines
- › Advanced Reporting Excel Add-in
- › **planguru® Analytics** - a cloud based reporting tool that allows you to create a dashboard of key performance indicators, where you can view and analyze both financial and non-financial data anywhere, anytime in secure online environment



planguru® Professional Advisor Program

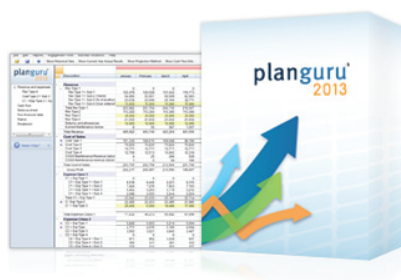
planguru® Community – Gain exposure to potential clients by creating a profile that highlights your financial expertise. We might also send you referral business if we think you would be a good fit for another customer who needs help. This is a free benefit.

Referral Program – Pass on a discount or earn a commission when you refer anyone to PlanGuru.

planguru® UNIVERSITY

PlanGuru University (PGU) is a free curriculum for any licensed user of PlanGuru 2013. It is designed to take your personal knowledge of PlanGuru to the next level, and can also provide training and support to any Financial Forecasting Analyst within your firm. Graduates will become PlanGuru experts in a matter of weeks with a series of six (1 hour) classes and five case studies. More importantly, we teach students to identify potential client engagements (with new and existing customers) and how to effectively sell these profitable consulting services. Learn more at www.planguru.com/pgu

Pricing



PlanGuru 2013 Enhancement Package <i>Can be used on an unlimited number of clients</i>	\$799.90
Additional License(s)	\$249.95
Network Capabilities	\$399.95
Advanced Reporting Excel Add-in	\$199.95

All prices are for perpetual licenses