SNAP PROJECTIONS

Welcome to the Snap Projections Toolkit!

Included are templates and other resources to help you effectively gather client information and promote the value of financial planning to your clients.

click underlined titles for downloads

Financial Planning Questionnaires

The Financial Planning Questionnaire template is designed to help you gather personal and financial data from your clients in the format required to enter it into Snap Projections.

The Financial Planning Questionnaires are provided as Microsoft Word documents that you can modify. Feel free to add your logo, change the wording, and customize them to your own needs.

New Financial Plan Creation Checklist

The New Financial Plan Checklist is intended to help you follow some basic first steps when setting up a new scenario for your clients. Just like an auto mechanic may follow a checklist while inspecting cars, you might find this checklist useful so you don't forget to review any inputs and possible optimizations while creating scenarios!

The New Financial Plan Checklist is provided as a Microsoft Word document that you can modify. Feel free to add your logo, change the wording, and customize it to your own needs.

Sample Reports

Snap Projections was designed to help you rapidly create and modify financial plans with a very intuitive and collaborative interface where you can show your clients their whole life on one page. This is terrific in a meeting setting, but if you want to create a handout for your clients we have the option to create customized reports.

There are several examples of client reports created using Snap Projections. You have full flexibility over which sections to include in your report; we have created a short and a long example for reference.

The Value of Planning One-Pager

This one-page promotional piece highlights why your clients and prospects should work with you to create a financial plan.

The Value of Planning One-Pager is a Microsoft Word document that you can modify. Feel free to add your logo, change the wording, and customize it to your own needs. We have also provided a Snap Projections branded PDF version if you want to print something off quickly!

External Resources:

- FP Canada - The Value of Financial Planning
- IAFP - Comprehensive Financial Planning

Completed Financial Plan Review Checklist

Snap Projections allows you to create quick and efficient financial plans to help answer your client's questions. In some cases, you may want to expand on the basic settings and assumptions in Snap Projections to further refine your plan. This checklist was developed through our Paraplanning Service to help you review your plans and to provide optional prompts for consideration.

The full checklist is available through the following article: Plan Review Checklist

Quantifying the Value of an Advisor

There have been studies on the value advisors can add to their clients' lives through relationship-oriented services.

Putting a value on your value: Quantifying Vanguard Advisor's Alpha®

"*We believe implementing the Vanguard Advisor's Alpha framework can add up to, or even exceed, 3% in net returns for your clients and help you differentiate your skills and practice. Like any approximation, the actual amount of value added may vary significantly, depending on clients' circumstances.*"

Gamma in Action: Financially sound households get advice from financial planners.

"*Of the four sources of financial information we studied, we find that households working with a financial planner made the best overall financial decisions. Meanwhile, those households working with a transactional advisor made the worst financial decisions of the group.*"