

Enterprise Essentials



Enterprise Essentials is designed for organizations that want to provide more value to the financial advisors associated with their organization (such as broker/dealers, fund companies, TAMPs, etc.). This option provides enterprises a simple low-cost entry point for all of your advisors to access fpPathfinder's flowcharts and (coming soon) checklists, and allows them to upgrade themselves to a white-labeled version if they desire.

Benefits:

- Help your advisors find answers to common planning questions quickly and easily
- Reduce the time and effort you spend producing content to educate and train your advisors
- Discounted pricing for your advisors who wish to upgrade to a Deluxe membership. (the upgrade fee would be paid by the advisor)

Features:

- Flowcharts and checklists personalized with each advisor's name
- Firm-level administrator privileges to manage advisor access (add or remove advisors, with one consolidated invoice)
- Custom enterprise portal for advisors to access their flowcharts and checklists directly
- Ability for advisors to upgrade to their own Deluxe Membership (at a discounted rate, to be paid directly by the advisor). Deluxe Membership includes:
 - Ability for advisors to white-label their own firm logo and select a matching color palette from available options
 - Reproduction rights to share flowcharts digitally via social media or on the advisor's website
- Billed annually on credit card or invoice based on the pricing structure described below:

Pricing:

Licenses	Up to 20	Up to 100	Up to 250	Up to 500	Up to 1000
Essential Base Fee (paid by Enterprise)	\$950/yr	\$3,950/yr	\$7,450/yr	\$9,950/yr	Negotiable
Per-Advisor Upgrade to Deluxe (paid by the advisor)	\$199 per year, per advisor	\$185 per year, per advisor	\$165 per year, per advisor	\$149 per year, per advisor	Negotiable