

## **For Immediate Release**

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## **Interactive Advisory Software Integrates with MoneyGuidePro**

**ATLANTA, GA – July 27, 2009** – PIETech, Inc. the creators of MoneyGuidePro (MGP) and Interactive Advisory Software (IAS) announce a ground breaking partnership for the financial planning community. For the first time, two leading competitors will integrate forces for the good of the planner. Both companies compliment one another to cover the complete spectrum of financial planning; although some could consider them to be competitors, each product has strengths that support different audiences.

Bob Curtis, CEO of PIETech, Inc. states, “The willingness of IAS to integrate with MoneyGuidePro is the strongest action I have seen from any vendor in the support of the advisor’s ability to choose best-of-breed software applications. It demonstrates their commitment to putting the needs of the advisor first.”

MGP, a leader in integration, is teaming up with IAS, the only unified wealth management system. The two industry greats are providing advisors with a choice in planning software. This expands the planner’s toolbox allowing them to customize the best planning solution for their firm. MGP is recognized as one of the best goal-based planning products on the market today and IAS is considered the most comprehensive detailed, cash-flow based system available.

MGP (Software Product of the Year 2008) combines sophisticated financial planning with ease-of-use (for advisors) and clear, concise results (for clients). MGP’s winning combination is completely web-based, and the only goal-based planning system sophisticated enough to produce a high quality Financial Plan. With MGP, Advisors can create a Retirement Lifestyle Plan to show clients how to maximize the satisfaction and enjoyment they will obtain from their money during their lifetime. It is particularly effective in helping restore client confidence during down markets.

IAS, supported by a relational database containing client goals, tax and cash flow items, assets, liabilities, and insurance, provides the holistic perspective you need to advise clients on retirement planning, education funding, and estate planning. IAS enables planning scenarios based on cash flow and client goals. Allows review of financial goals and portfolio performance seamlessly, calculates multi-year net worth, cash flow, and tax projections and controls risk by setting alert conditions and alarm thresholds.

The uniqueness of this relationship is in the overlap of services. Both firms however recognize that while some planners benefit more from the ease-of-use goal based system found in MGP, some CFPs rely on the detail found in an extended cash flow based system of IAS. Some planners even utilize both products depending on the level of detail their client needs.

For those planners who don’t require the level of sophistication provided by IAS they can enjoy MGP for all their planning needs and still benefit greatly from IAS’ CRM, Portfolio Management, Back Office Services and Client Portal features. This relationship positions IAS as MGP’s only integration partner to offer all three: CRM, Portfolio Management and Financial Planning.

Herzl Hyton, Chairman and Founder of IAS states, “IAS and MGP truly compliment each other to cover every aspect advisors need for financial planning and wealth management.”

Generally speaking, for advisors that want sophisticated, easy to use, goal based planning for both pre & post-retirement planning, MGP is the best in the business, for those who need the detail provided in comprehensive cash-flow based pre & post-retirement planning, no other system compares to the sophistication found in IAS. And now the two are integrated partners! Check out the web for more details, or call for a demo and get started planning today! [www.iassoftware.com](http://www.iassoftware.com) [www.moneyguidepro.com](http://www.moneyguidepro.com)

**About Interactive Advisory Software [www.iassoftware.com](http://www.iassoftware.com)**

Interactive Advisory Software (IAS) offers the first unified, browser-based solution enabling financial advisors to simplify their workload and provide greater service to their clients. IAS caters to the full spectrum of an advisor's needs, from prospecting for new customers to serving the investing and planning needs of the most complex clients. The system is built utilizing a consistent, intuitive, visual interface and includes integrated, comprehensive financial planning; portfolio management; client relationship management; rebalancing, client portals and outsourced back office services. Experience The Power of ONE!

**About MoneyGuidePro [www.moneyguidepro.com](http://www.moneyguidepro.com)**

MoneyGuidePro provides an exciting new approach to Financial Planning. MGP provides a goal-oriented process that is faster, easier and more engaging for the client. Advisors can create a Retirement Lifestyle Plan to show clients how to maximize the satisfaction and enjoyment they will obtain from their money during their lifetime. It is particularly effective in helping restore client confidence during down markets. MGP has been hailed as "the most innovative product to come along in a long time" and was selected as the "Software of the Year for 2008". For more information, please visit [www.moneyguidepro.com](http://www.moneyguidepro.com) or call 800.841.5312.

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