

Join us for this informative webinar:

Cash-Flow vs. Goals-Based Planning: The Great Debate

Thursday, March 23, 2023

12 – 1 p.m. ET

Join Envestnet | MoneyGuide for this informative webinar where we'll discuss how two different planning philosophies, cash-flow and goal-based, can be used in the financial planning process. The industry's leading financial planning software company will review the benefits and considerations of each approach to ultimately determine which will be most beneficial to individual clients.

- Identify characteristics of cash-flow and goal-based theory.
- Analyze the ability to meet long term financial obligations and measure the impact of financial strategies on the plan.
- Use software to illustrate recommendation development using each theory.

Don't miss this opportunity to learn more about these financial planning approaches from the experts at Money Guide Pro!

Register now:

<https://axosevents.webex.com/weblink/register/602414161d22a9784c4843b2d4462be>