

WHAT'S NEW IN...

Profiles Forecaster v12.0

Release Date: October 28, 2013

Collect, exchange and maintain client data more efficiently with new interactive PDF forms.

- [Interactive Printable Forms](#)
- [Morningstar® Asset Classifier Database update](#)
- [Learning Center](#)

HERE ARE THE DETAILS

Enter and save data to Printable Forms

Printable Forms in Profiles Forecaster™ allow you to quickly collect and enter your clients' financial information. In Profiles Forecaster™ v12.0, enhancements to these forms allow you or your clients to enter data directly into the PDF. This allows you to print and share data quickly and easily from your PC.

HOW? To get started:

1. Access the **Forms** menu from the toolbar and select **Printable Forms**.
2. Open your desired form and save it to your desktop.
3. Enter data into the PDF. When you are satisfied, save your changes.

What requirements are there for using interactive forms?

In order to use the new Profiles Forecaster™ interactive forms, you must have AdobeReader XI (or higher). Without it, you will still be able to access and print the forms, but will not be able to save any of the data you enter.

Get the most up-to-date asset classification information with Morningstar® updates

Profiles Forecaster™ has been updated with the latest asset classification information from Morningstar® Asset Classifier Database.

PROFILES FORECASTER™ LEARNING CENTER

Find training, support, and additional resources quickly and easily in the Profiles Forecaster™ Learning Center. Use the Learning Center as your first stop for finding supporting documentation, training opportunities, and the latest updates to Profiles Forecaster™.

HOW? To access the Profiles Forecaster™ Learning Center, select **Learning Center** from the **Help** menu.

The following resources are available on the Learning Center to help support your needs with Profiles Forecaster™:

- Training videos
- Take Action webinars
- Training Catalog
- Profiles Forecaster™ User Manuals
- Functional Documents
- Release Notes

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TRAINING SPOTLIGHT

Learn more about Profiles Forecaster™ v12 by attending one of these complimentary webinars:

- What's New in Profiles™ v12.0 (webinar)
 - [October 29, 2013 at 12:00pm CT](#)
 - [November 7, 2013 at 12:00pm CT](#)

Supported Platforms for Profiles Forecaster™

- Microsoft Windows XP (Service Pack 3), Windows Vista, Windows 7, or Windows 8.
- Microsoft .NET Framework v4.
- 2 GB of RAM or higher.
- Browsers:
 - Recommended: Microsoft Internet Explorer 10.
 - Supported: Apple Safari v5 or higher, Google® Chrome v20 or higher, Mozilla Firefox® v13 or higher.
- Adobe Reader:
 - Recommended: Adobe Reader XI (required for Interactive Printable Forms).
 - Minimum: 7.0 or higher