

WHATS NEW IN...

Profiles Forecaster v12.1.30

Release Date: June 30, 2016

Deliver precise client plans with updated college costs and social security values.

- College Cost Updates
- Social Security Value Updates

- Morningstar Classifier Database Updates
- Miscellaneous Improvements

HERE ARE THE DETAILS

College Costs Updates

The update for college costs is for the 2015-2016 academic year including updated client reports and a database provided by the College Board. In addition several Printable forms contain college costs data that will be updated. These reports include:

- · College Costs by Region
- Cost of Education
- Ways to Pay for College
- Tax Advantages of Funding Higher Education

Morningstar Classifier Database update

The Morningstar Classifier Database has been updated to include information from Q3 of 2015.

Social Security Value Updates

Consists of updates to several indexed values including the earnings base, formula bend points, and the average annual wage index amounts.

Miscellaneous Improvements

- Client/Owner search by first name
- Cash Flow Worksheet Printable Form now includes automatic total calculations
- Add new Profiler designations:
 - ADPA® Accredited Domestic Partnership Advisor(SM)
 - ChHC® Chartered Healthcare Consultant
 - CAP® Chartered Advisor in Philanthropy
 - RICP® Retirement Income Certified Professional

Supported Platforms for Profiles™ Professional Profiles Forecaster v12.1.30

- Adobe® Reader: version 7.0 or higher
- Browsers:
 - Microsoft® Internet Explorer: version 8.0 or higher
 - Google® Chrome: version 20.0 or higher
 - Mozilla Firefox® version 13 or higher
 - Apple® Safari: version 5.0 or higher
- Display: 1024 x 768 or higher

