

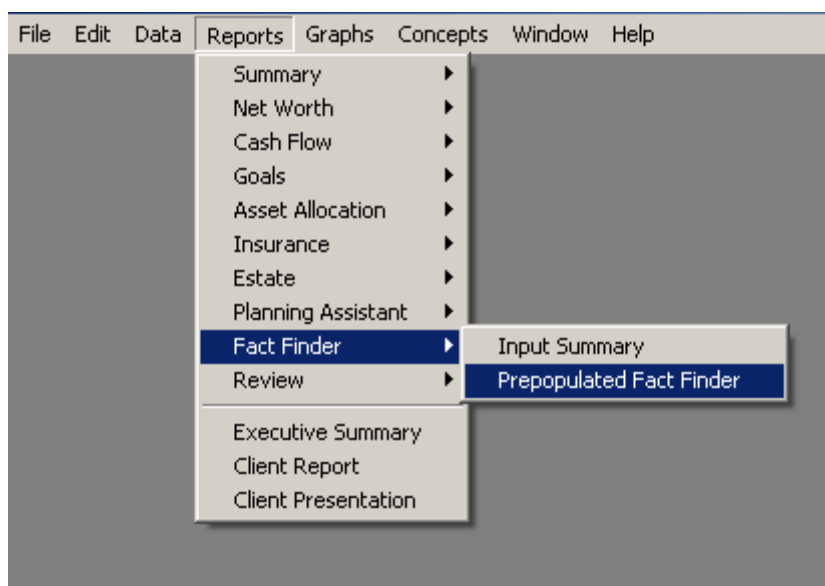
## The Prepopulated Fact Finder

Data verification is an essential step that should be performed during creation of the Base Plan and immediately after during its creation. The base data is the foundation upon which advisors develop financial planning strategies for their clients. Incorrect data will affect the accuracy of any predictions.

Along with the numerous reports and graphs available in NaviPlan Standard for data verification, there is a *Prepopulated Fact Finder* you can generate that lists all the data entered in your plan.

You can then present this report to your clients so they can verify the data and correct any errors or omissions.

To access the *Fact Finder* go to **Reports, – Fact Finder – Prepopulated Fact Finder.**



For ease of data entry, the *Prepopulated Fact Finder* lists all the data entry items in the same order that you entered them into NaviPlan Standard.

**Prepopulated Fact Finder**

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**Personal Information**

1. Personal Information

Title:	Mr.	First Name:	Justin	Last Name:	Gregory	SIN:	111 111 118	Birth Date:	Dec 01 1962	Gender:	Male
Marital Status:	Married		Citizenship:	Canadian							

Contacts

Home Phone #:	(905) 555-9832	Business Phone #:	(416) 555-4598	Cell Phone #:		Fax #:		Pager #:		
Email Address:	jkgregory@anydomain.com									

Address

Street:	3218 Berkshire Lane	City:	Burlington	Province:	Ontario	Postal Code:	L7M 3Z1
Country:	Canada						

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2. Personal Information

Title:	Mrs.	First Name:	Kathryn	Last Name:	Gregory	SIN:	111 111 117	Birth Date:	Jan 14 1964	Gender:	Female
Marital Status:	Married		Citizenship:	Canadian							

Contacts

Home Phone #:	(905) 555-9832	Business Phone #:	(905) 555-3244	Cell Phone #:		Fax #:		Pager #:		
Email Address:	jkgregory@anydomain.com									

Address

Street:	3218 Berkshire Lane	City:	Burlington	Province:	Ontario	Postal Code:	L7M 3Z1
Country:	Canada						

You can print the *Prepopulated Fact Finder* and present it to your clients for review. You can also export it as an RTF document by either right-clicking the report icon, and then selecting *Export*, or by selecting the appropriate export or print option from the *File* menu.

