

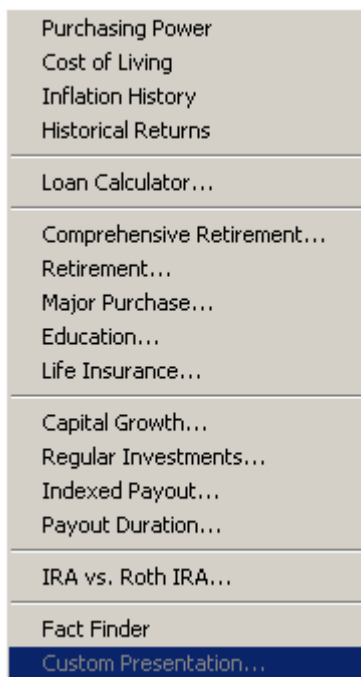
Creating Custom Presentations

Do you know that you can present a *Custom Presentation* to your clients from within NaviPlan? For example, you may want to access a PowerPoint slide presentation after discussing the planning process with your clients.

Go to the **Edit** menu, and then select **Preferences**. The Preferences dialog box opens. Select the **Concepts** tab. Under *Custom Presentation* specify the path (directory and folder) where your presentation is saved in the *Command* field, and then click **OK**.

The screenshot shows the 'Preferences' dialog box with the 'Concepts' tab selected. The 'Return Rates' section includes fields for Interest (6.00%), Dividends (0.00%), Capital Gains (0.00%), Tax Free (0.00%), Deferred Growth (0.00%), and Return Rate for Qualified Investments (10.00%). The 'Milestones & Other' section includes Retirement Age (65), Life Expectancy (90), Inflation Rate (3.00%), and Tax Rate (22.00%). The 'Custom Presentation' section has a 'Command' field containing the path 'V:/NaviPlan Extended/Custom Presentation.ppt' and a browse button (...).

Go to the **Concepts** menu, and then select **Custom Presentation**.



Your presentation is brought into NaviPlan and displays on the screen.

The *Custom Presentation* feature eliminates the need to access another directory while you are working in the software.