

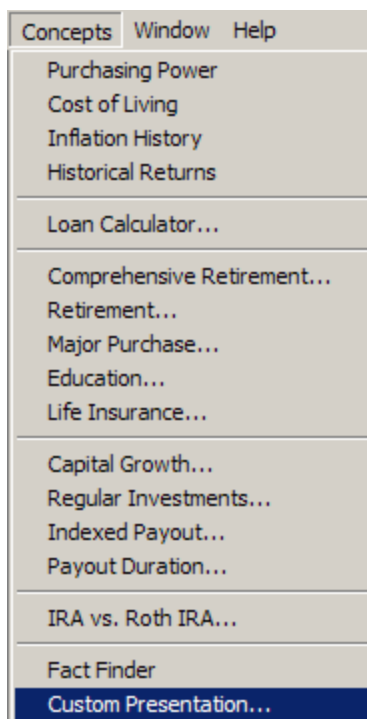
Creating Custom Presentations

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 **Edit – Preferences**, and then select the **Concepts** tab. You will see a *Command* field under the *Custom Presentation* section. You need to specify the path (directory and folder) that your presentation is saved in, and then click **OK**.

The screenshot shows the 'Preferences' dialog box with the 'Concepts' tab selected. The 'Return Rates' section includes a checkbox for 'Interest Only' and input 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 with the text 'C:\NaviPlan\Standard\Custom Presentation.ppt' and a browse button (...). The 'Command' field is circled in red.

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



Your presentation imports into NaviPlan and displays on the screen for viewing.

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