

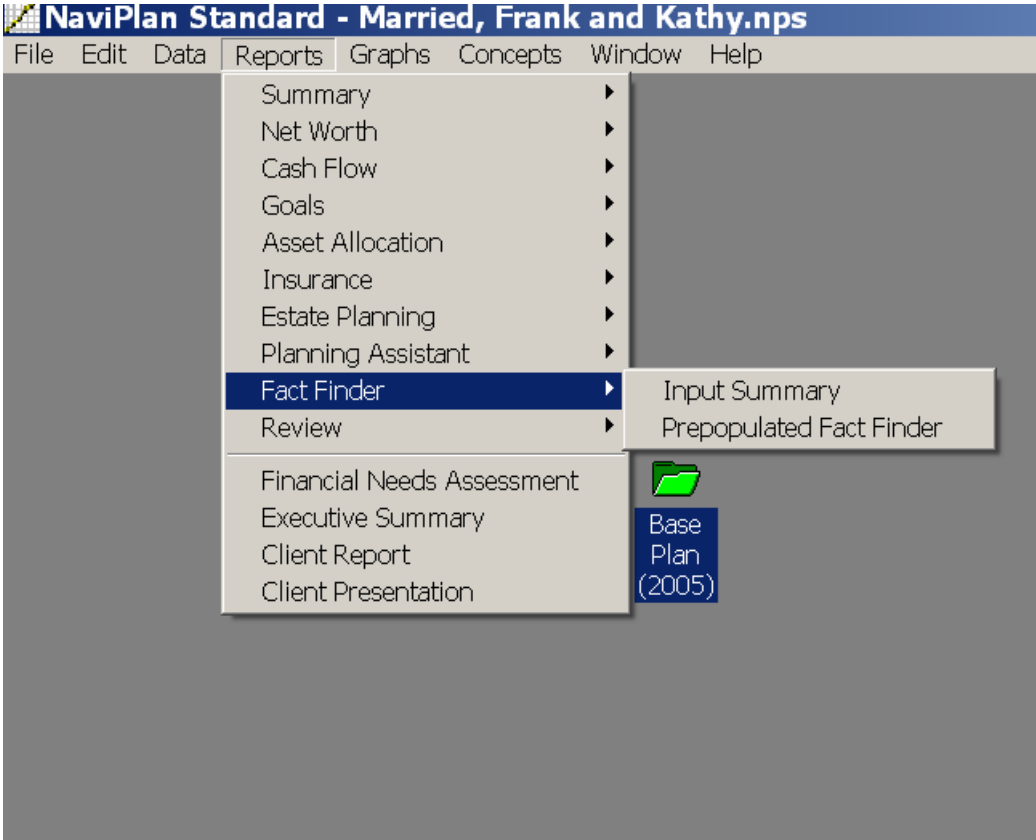
The Prepopulated Fact Finder

Data verification process is an essential step that should be performed during creation of the *Base Plan* and immediately after. The base data is the foundation upon which planners or advisors recommend financial planning strategies to 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 present this report to your clients so they can verify the data and notify the planner of 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 they you entered them into NaviPlan Standard.

Prepopulated Fact Finder

Personal Information

Personal Information

Title	First Name	Last Name	SSN	Birth Date	Gender
Mr.	Jack	Monroe	000-00-0000	Sep 23 1963	Male
Marital Status	Citizenship	Cell Phone #	Pager #		
Single					
Email Address	Street				
	422 Taylor Boulevard				
City	State	Zip Code	Country	Home Phone #	
Shreveport	Louisiana	87400	United States	(603) 555-4622	
Employer Name	Title	Occupation	Business Phone #		
Business Fax #	Street	City	State		
			California		
Zip Code	Country				

Personal Information

Title	First Name	Last Name	SSN	Birth Date	Gender
Mrs.	Elizabeth	Monroe	000-00-0000	Mar 06 1964	Female
Marital Status	Citizenship	Cell Phone #	Pager #		
Single					
Email Address	Street				
	422 Taylor Boulevard				
City	State	Zip Code	Country	Home Phone #	
Shreveport	Louisiana	87400	United States	(603) 555-4622	
Employer Name	Title	Occupation	Business Phone #		
Business Fax #	Street	City	State		
			California		
Zip Code	Country				

Children

Child

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.

