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# 2009 Annual Update

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## Release Overview

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## Introduction

The Annual Update is focused on delivering the most current statistical data, ensuring that the program's calculations and client reports are as accurate as possible. The purpose of this document is to provide information regarding the 2009 Annual Update for the following applications covering the Desktop, Web and UDA platforms:

- Profiles Professional 9.0
- Profiles Forecaster 4.0
- Profiles Professional 8.0\*
- Profiles Forecaster 3.0\*

\*Please note these application updates are available to Enterprise clients only.

\*\*The Annual Update will not be available for Professional 7.6 or Forecaster 2.5.

## Overview

Based on the availability of the data for the 2009 Annual Update, Profiles has organized the Annual Update into two phases.

### Phase 1

Phase 1 includes updates to the following:

Federal income tax rates	College costs
Business tax statistics	Business ratios
Estate rates	Medicare
Social Security benefits	FINRA Approval Changes*

\* The changes only apply to Professional 9.0 and Forecaster 4.0

### Phase 2

Phase 2 includes updates to the following:

Ibbotson Asset allocation and Monte Carlo updates	Dow Jones Industrial Averages Updates
Retirement statistics	Inflation update
Disability statistics	Forefield updates
Long-term care statistics	Fact Finder update

*Note: Phase 2 will include all of Phase 1 changes*

## Availability and Delivery

### Retail and Sponsorship

All retail and sponsorship users will be required to upgrade via auto update to the new Profiles Professional 9.0 version and/or Profiles Forecaster 4.0 version prior to receiving the Annual Update Phase 1. The full release of the products is meant to be distributed solely to new users of the applications or those clients unable to use the Auto Update feature.

The table below details the release schedule and delivery methods for Retail and Sponsorship clients, Phase 1 and Phase 2 of the 2009 Annual Update.

Phase	Date	Delivery Methods	Comments
1	January 2009	<u>Patch</u> File size: <ul style="list-style-type: none"> <li>• Profiles Professional: ~400KB</li> <li>• Profiles Forecaster: ~400KB</li> </ul> Deployed via: <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Auto Update</li> </ul>	Users must upgrade to Professional 9.0 or Forecaster 4.0 in order to take the Phase 1 update.
2	June 2009	<u>Patch</u> File size: <ul style="list-style-type: none"> <li>• Profiles Professional: TBD</li> <li>• Profiles Forecaster: TBD</li> </ul> Deployed via: <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Auto Update</li> </ul> <u>Full Release</u> File size: <ul style="list-style-type: none"> <li>• Profiles Professional: TBD</li> <li>• Profiles Forecaster: TBD</li> </ul> Deployed via: <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Via CD</li> </ul>	The Service Pack will be made available via AutoUpdate .  The full release will include both phases of the 2009 Annual Update  The full release of the products is meant to be distributed solely to new users of the applications or those clients unable to use the AutoUpdate feature.

## Enterprise Clients

The Annual Update for Phase 1 and Phase 2 will be available to Enterprise clients for both Professional 8.0/9.0 and Forecaster 3.0/4.0. Profiles Relationship Managers will contact their respective enterprise clients to coordinate the best possible delivery method.

The table below details the release schedule and delivery methods for Enterprise clients, Phase 1 and Phase 2 of the 2009 Annual Update.

Phase	Date	Delivery Methods	Comments
1	January 2009	<p><u>Patch</u> File size:</p> <ul style="list-style-type: none"> <li>• Profiles Professional: ~400KB</li> <li>• Profiles Forecaster: ~400KB</li> </ul> <p>Deployed via:</p> <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Auto Update</li> <li>• Professional Services Engagement</li> </ul>	Enterprise clients that are currently on Professional 7.6 and/or Forecaster 2.5 must upgrade to Professional 9.0 and/or Forecaster 4.0 in order to receive the Annual Update Phase 1
2	June 2009	<p><u>Patch</u> File size:</p> <ul style="list-style-type: none"> <li>• Profiles Professional: TBD</li> <li>• Profiles Forecaster: TBD</li> </ul> <p>Deployed via:</p> <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Auto Update</li> <li>• Professional Services Engagement</li> </ul> <p><u>Full Release</u> File size:</p> <ul style="list-style-type: none"> <li>• Profiles Professional: TBD</li> <li>• Profiles Forecaster: TBD</li> </ul> <p>Deployed via:</p> <ul style="list-style-type: none"> <li>• Profiles' Website</li> <li>• Via CD</li> <li>• Professional Services Engagement</li> </ul>	<p>The Patch will be made available via Auto Update.</p> <p>The full release of the products is meant to be distributed solely to new users of the applications or those clients unable to use the AutoUpdate feature.</p>

*\*Note: Enterprise clients can choose to deliver the patch via auto update or can provide this update as a download on their own site (e.g. Intranet) by downloading and posting the file.*