



INTRODUCING
praxis
PRACTICE MANAGEMENT SUITE



Praxis is Ausdal Financial Partners new integrated suite of “best of breed” practice management tools. With Praxis, you can take advantage of discounted pricing on a comprehensive array of applications and services selected to help you build your business, streamline operations and free you to spend more time with your clients. Consider the benefits...

FLEXIBLE

We realize that no two people (or practices) are alike. All Praxis components are subscription based services that allow you to select only the applications you need, when you need them.

WEB BASED

Praxis’ web based platform means that you don’t have to worry about software, downloads and system requirements. All of your information is right at your fingertips anytime, anywhere

INTEGRATED

Albridge data can be integrated into most applications. This means that updated client account information can be seamlessly shared with other applications for maximum efficiency

THE PRAXIS APPLICATIONS

Within Praxis you will find a collection of “best of breed” practice management applications selected to help you develop and manage your practice more effectively. Select only the tools that fit your needs. Applications include:

FINANCIAL PLANNING

NAVIPLAN SELECT

Offers a full range of planning capabilities in one program. Pick your plan, from simple to sophisticated. NaviPlan helps you produce a wide array of reports and plans including calculators, financial assessments, asset allocations, modular and multi-level plans, Monte Carlo analysis and more.



PROFILES FORECASTER

is an easy-to-learn, goals-based application that keeps data entry to a minimum. You can tailor action-oriented results in a clear, ready-to-present format. It is ideal for providing basic financial assessment to investors with \$500,000 or less. **PROFILES PROFESSIONAL**



is designed to offer a deeper level of planning with additional planning modules and cash flow based projections. A library of more than 400 client reports feature colorful, easy-to-read presentations.

MONEYGUIDE PRO

is a comprehensive easy-to-use, goal-based financial planning system that delivers understandable, visually appealing analysis. Ideal for mainstream planning needs.



CLIENT WEALTH REPORTING AND DATA

ABRIDGE WEALTH REPORTING

Albridge consolidates client account data from hundreds of disparate sources into one cohesive set of reports and statements. Albridge’s web based application allows you and your clients access to critical data and performance reporting anytime, anywhere.



ALBRIDGE WEB SERVICES

integrates your client account data with other Praxis applications. Daily updates can be seamlessly delivered into planning, analysis and contact management programs to efficiently optimize your practice.

RESEARCH AND ANALYTICS

MORNINSTAR ADVISOR WORKSTATION

provides advisors with investment planning, client presentation, portfolio analysis, and investment research tools. Advisors can efficiently analyze investments and portfolios to give recommendations using reports and information that clients can understand. Two Morningstar solutions are available to fit your planning and analysis needs.



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