



Press Release

EISI Launches New Versions of NaviPlan and Profiles Planning Software

New Interactive Presentation Tool and Redtail Integration to Increase Advisor Efficiency and Client Engagement

Winnipeg, MB, Canada, November 30, 2010 -- Emerging Information Systems Inc. (EISI), developer of NaviPlan® and Profiles™ financial planning software, today announced that new versions of NaviPlan Select, Profiles Professional and Profiles Forecaster are now available. Among other enhancements, these releases include the launch of Presentation Module, a new interactive client presentation tool, for both NaviPlan and Profiles and, a new data integration for Profiles with Redtail CRM.

“Our latest enhancements focus on increasing client engagement, improving advisor efficiency, and enhancing both the advisor and client experience,” said Dr. Mark Evans, President and CEO of EISI. “Developing innovative tools and adding integrations to our industry-leading needs assessment and financial planning applications ensures that EISI continues to meet the changing and progressing needs of both advisors and their clients.”

Presentation Module makes client and prospect meetings more collaborative

Presentation Module is a new interactive sales tool available as an add-on to either NaviPlan Select v12.0.1.0 or Profiles Professional Web v10.0. It takes calculations from the application and presents them in an easy-to-use and highly visual slideshow format. Together, the advisor and client or prospect can identify needs and collaboratively explore solutions by making changes and viewing the impact on the results right on the screen. Advisors can easily switch between presentation and planning modes. Recommendations generated by the calculation engine are presented in either an attractive slideshow or a client-friendly report.

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EISI offers editing capabilities for enterprise firms who wish to customize presentations, add audio, video, or hyperlinks and centrally manage content. Sun Life Financial, an international financial services provider, has 3,000 advisors using a Sun Life version of the tool. “SunVision Financial Analyzer further strengthens the relationship between advisors and clients,” said Vicken Kazazian, Senior Vice-President, Career Sales Force, Sun Life Financial Canada. “This is an industry-leading financial needs analysis tool. It helps our advisors have conversations with clients designed to help the client achieve lifetime financial security.”

To learn more about Presentation Module for NaviPlan Select, visit

http://eisi.com/products/us/naviplan/assets/sell_sheets/naviplan_select_presentation_module.pdf.

To learn more about Presentation Module for Profiles Professional, visit

http://eisi.com/products/us/professional/assets/sell_sheets/profiles_presentation_module.pdf.

Redtail CRM Integration improves efficiency

EISI has partnered with Redtail Technology to offer Redtail CRM integration with Profiles Professional Web v10.0 and Profiles Forecaster Web v5.0. The integration enables advisors to export Redtail data to Profiles in a few clicks, eliminate duplicated effort and wasted time, and reduce data entry errors. Brian McLaughlin, CEO of Redtail said, “The integration with Profiles is a great example of two companies working together to help our users get more from their software solutions. Most offices are using three or four different pieces of software and a lot of time is spent entering redundant data. The Redtail/Profiles integration will help eliminate the redundant data entry for users of both products.” To learn more about the Redtail CRM integration, visit

http://eisi.com/products/us/professional/assets/sell_sheets/redtail_integration.pdf.

Highlights of new features and enhancements in NaviPlan and Profiles

NaviPlan Select v12.0.1.0

Enhanced pre-retirement cash flow management – Redemption functionality is now available in plans using both the Average Tax and Detailed Tax methods.

To learn more about NaviPlan Select v12.0.1.0, visit www.eisi.com/naviplan.

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Profiles Professional v10.0

Case review – Scheduling case reviews on a regular basis provides a way for advisors to stay in front of clients and increase their planning-related activity. The new Case Review feature allows advisors to effortlessly generate prepopulated Client Review Worksheets and efficiently update existing plans for annual or periodic review and analysis.

Basic workflow – Case management capabilities are enhanced as client cases can be tracked from draft to final and PDF presentations can be stored automatically once cases are finalized.

To learn more about Profiles Professional v10.0, visit www.eisi.com/professional.

Profiles Forecaster v5.0

Budgeting capability – New features help advisors track clients' living expenses to identify cash surpluses or deficits and make having an in-depth cash flow discussion with clients easier and more effective.

To learn more about Profiles Forecaster v5.0, visit www.eisi.com/forecaster.

About EISI

EISI, developer of NaviPlan and Profiles software, offers the broadest selection of needs-assessment and financial planning tools in North America. Industry-leading software, combined with incomparable service and unrivaled scale, makes EISI the technology partner of choice for more than 250,000 financial professionals. Learn more at www.eisi.com.

More in the Release Overviews:

http://support.eisi.com/support_us/naviplan/permalink/release_notes/npse_v12.0.1.0_release_notes.pdf

http://support.eisi.com/support_us/profiles_professional/permalink/release_notes/Professional_Release_Overview_v10.pdf

http://support.eisi.com/support_us/profiles_forecaster/permalink/release_notes/forecaster_Release_Overview_v5.pdf

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To arrange an online demonstration, contact:

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