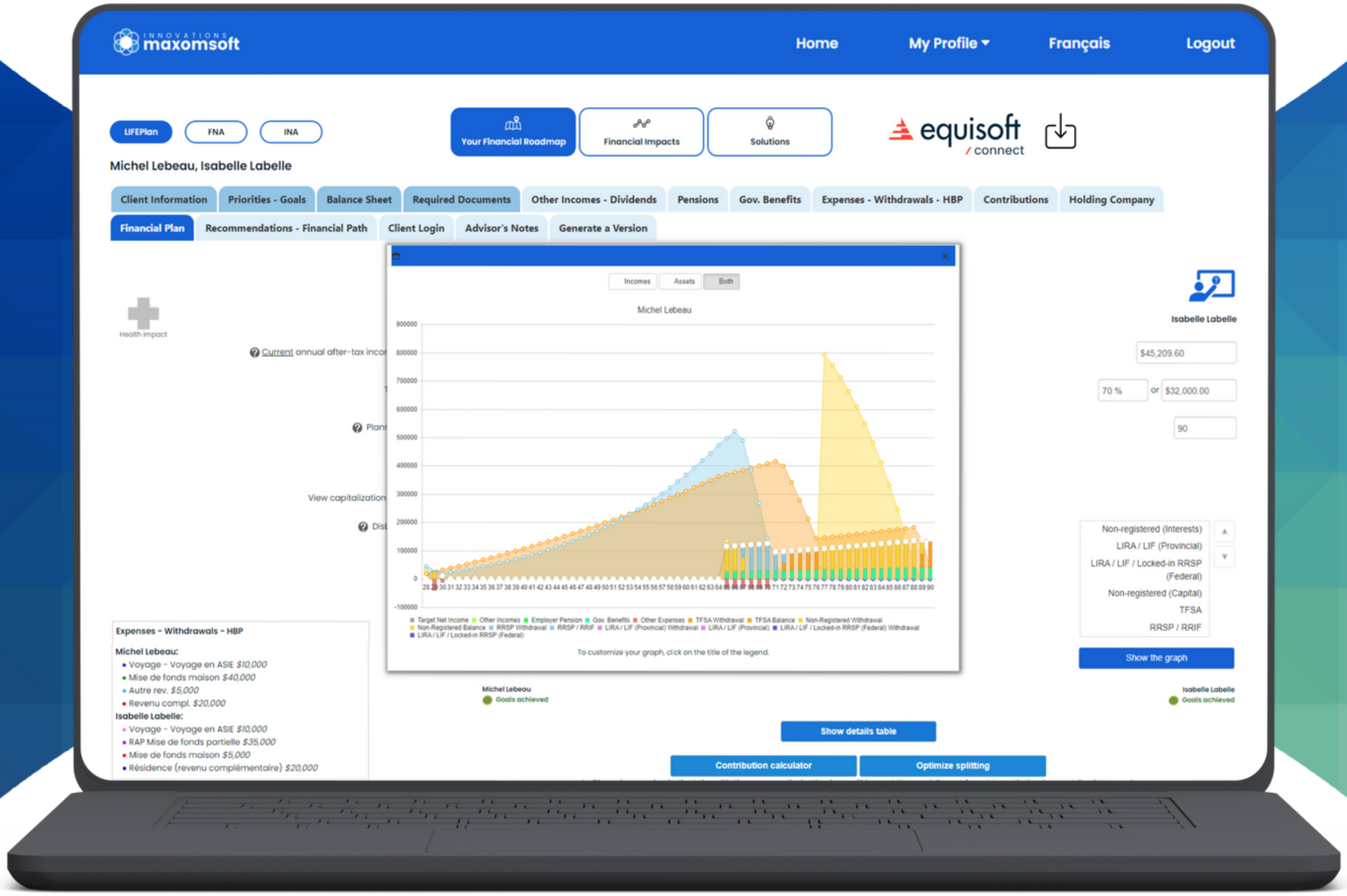
maxomsoft

LIFEPlan

Planning and Realizing Your Projects

A powerful and user-friendly solution.



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About Us

Maxomsoft is a privately held software company dedicated to helping Wealth Management Advisors achieve their goals.

Since 2020, our mission has been to offer solutions adapted to the needs of Advisors, by offering them digital tools that promote proximity to their clients and the growth of their business.

In 2019, following an invitation to participate in the StartUP program in residence at Desjardins, Marco Madon and Tom Madon, Co-Founders, decided to market their solution. They quickly formed a partnership with the firm Nexus Innovations, a company specializing in application and web development, taking full advantage of Microsoft technologies. With more than 70 in-house employees, Nexus provides Maxomsoft with expertise worthy of large technology companies.

Our Partners

nexus innovations

equisoft

maxomsoft.ca
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Laval (Qc) , Canada, H7T 2S3

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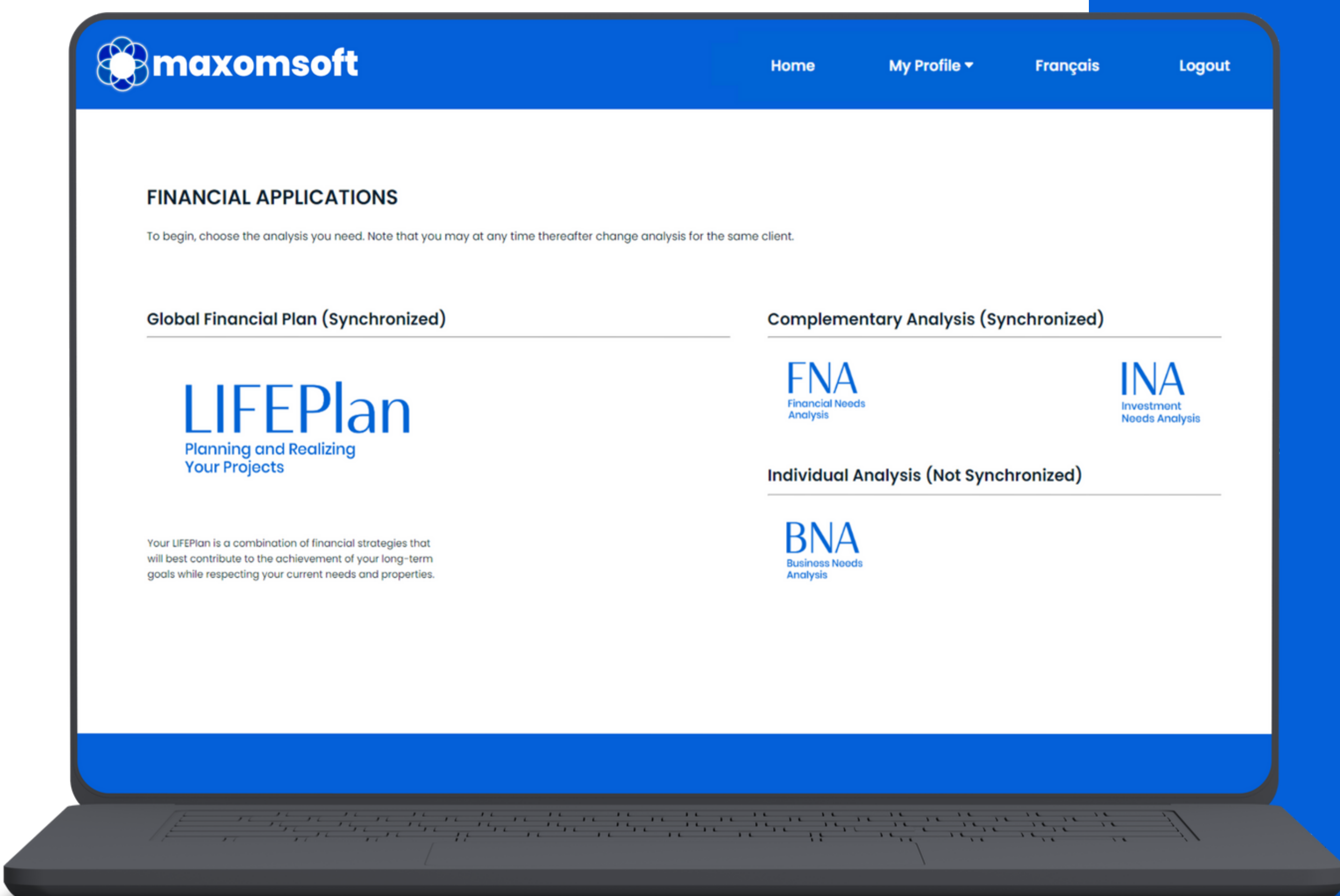
Discover the Advantages of the LIFEPlan Synchronized Financial Analysis System.

Our platform helps you perform financial analyses for both retirement planning and protection needs.



Tactical Advantages

Our system offers a wide range of features designed to help advisors in their practice and to promote client understanding.

Tab Navigation

Facilitating the search for recorded data and optimizing user friendliness.

Data Synchronization

Whether the advisors start with a FNA or another analysis, they will automatically find relevant data in the other analyses.

Bridge

Allowing clients to be imported from the equisoft/connect CRM to our LIFEPlan financial analysis system, including updating data.

INTERVIEW Mode

Module for collecting personal and financial information allowing you to forget nothing and to have all the required documents. In addition, it promotes a climate of trust with your client.

Easy Learning

On each of the tabs, and this in all apps, an icon allows you to open a video capsule explaining how it works, exactly where you are on the platform.

Your Logo in All Reports

The advisors can add the logo of their firm to all LIFEPlan reports.

Details and Specifics of the Analyses.

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The Global Financial Plan

Achievement Plan and the Retirement

The LIFEPlan financial strategies will enable various levers to be activated to help clients achieve their goals, regardless of life's events.

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Financial Security Test

Allows advisors to create three financial plan scenarios and make any necessary changes to illustrate the financial security test. They only need to follow the steps indicated on their computer screen.

Your Financial Roadmap | Financial Impacts | Solutions

Advanced Calculations

Automatic tax calculation

Home Buyers' Plan is shown on the map

Includes all types of income

Choice of priority order of withdrawal by plan

LIRA | LIF

Complies with the federal or provincial charter for provincial plans for the calculation of maximum allowable withdrawals.

Calculation of capital gains

Adjustment of the book value for withdrawals and contributions to the non-registered plan

Income splitting

Complies with tax rules.

Recovery of the Old Age Security

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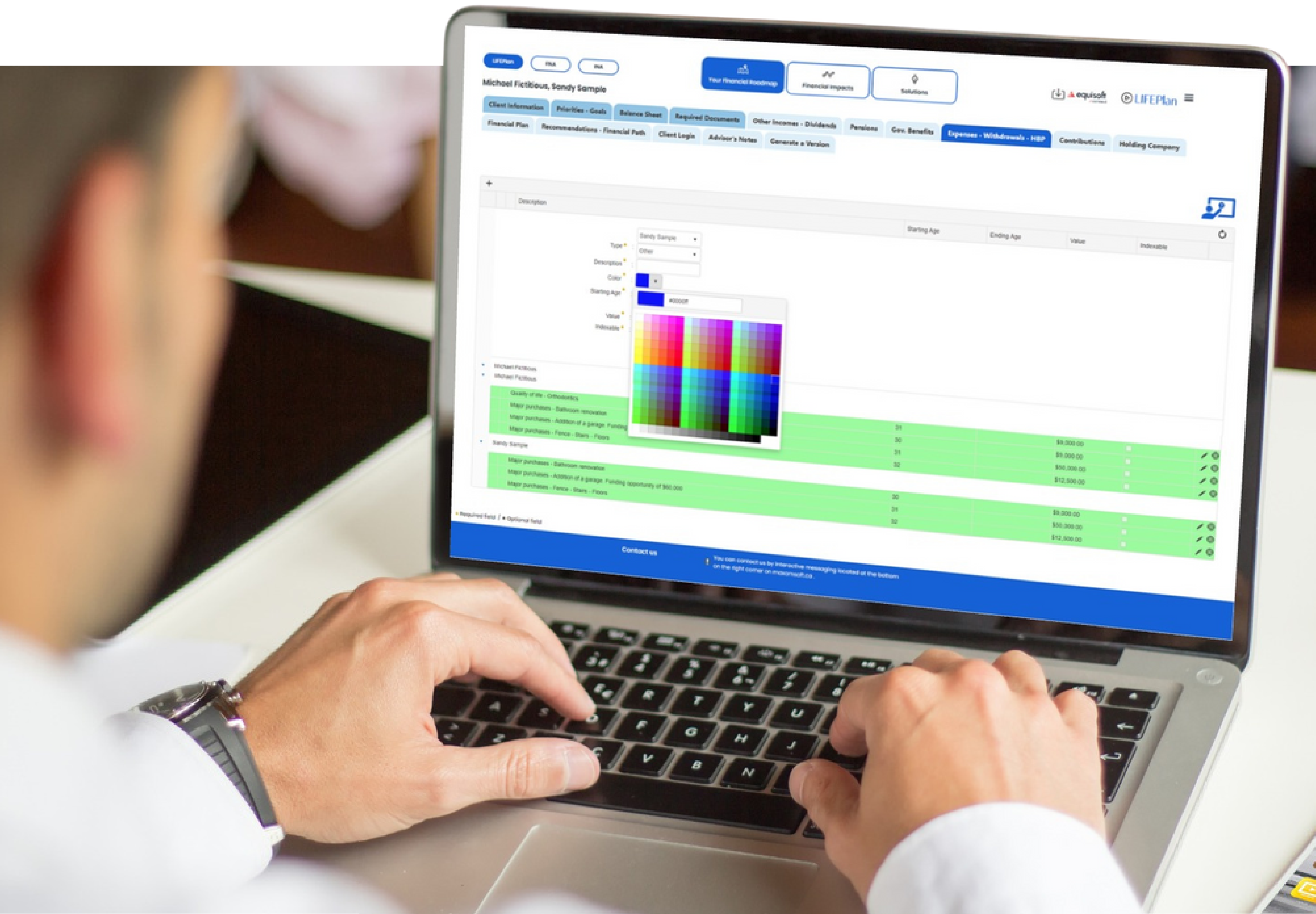
With LIFEPlan, you can illustrate each of the major expenses with a color to make it easier to identify in the spreadsheet.

This also makes the plan easy for your client to understand !



LIFEPlan

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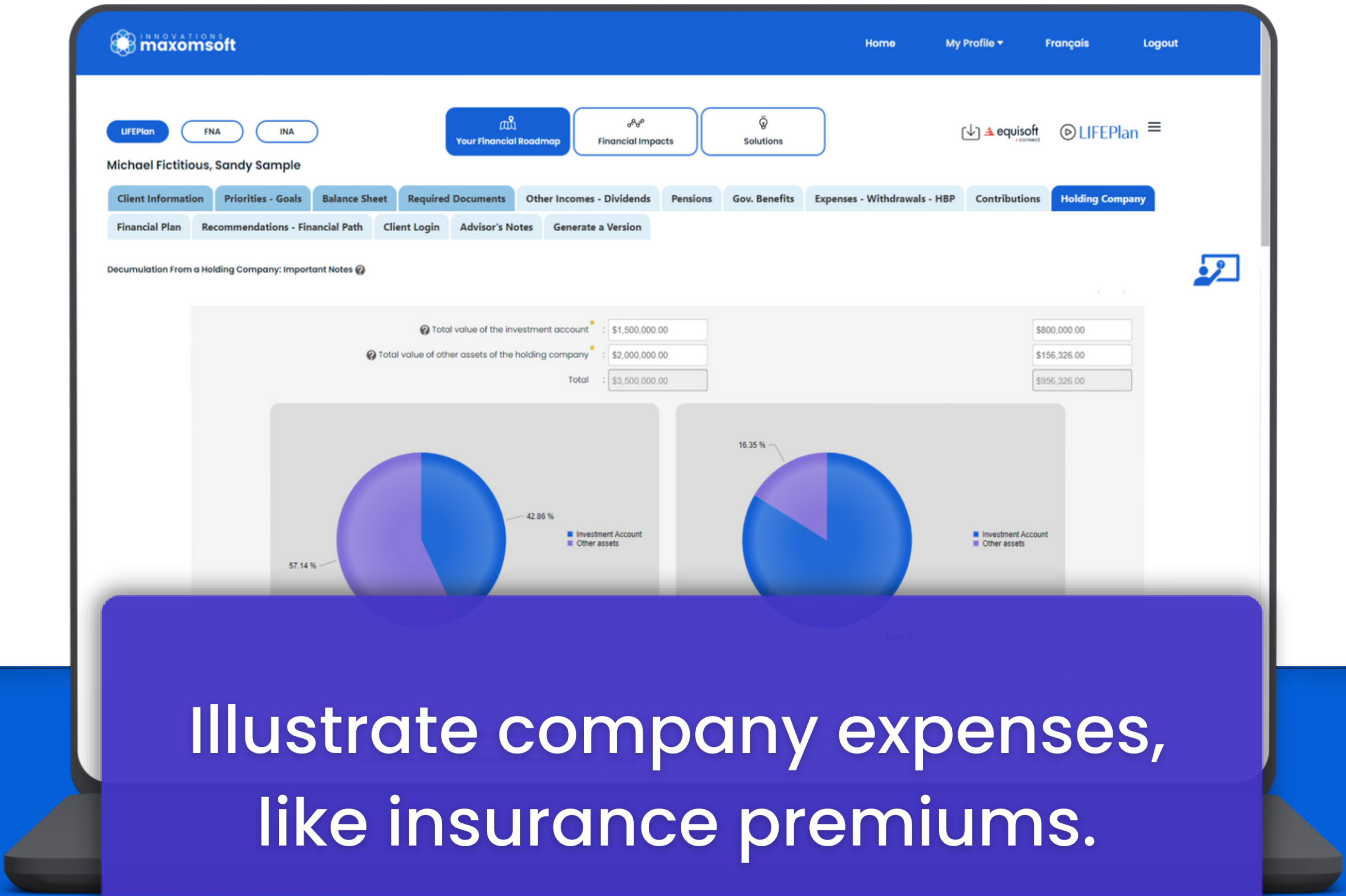
The Drawing Down Investments of a Holding Company

- Incorporate withdrawals into your client's financial plan.
- Set up your strategy (advances, eligible dividends or not, contributions, annual and lump sum withdrawals).



Illustrate company expenses, like insurance premiums.

Details and Specifics of the Analyses.

FNA
Financial Needs Analysis

The Financial Needs Analysis of the LIFEPlan system is designed to provide all the information needed to accurately determine the various protection needs.

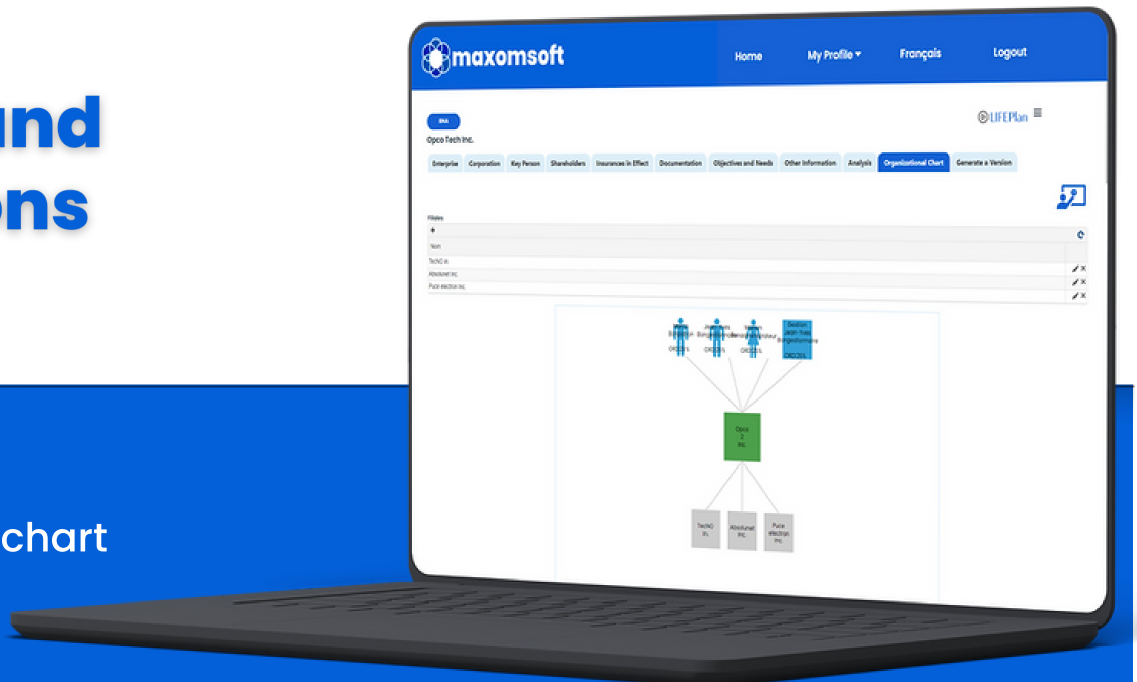
Features and Calculations

- **Maintaining standard of living upon death**
  Table of sources of income and asset withdrawal.
- **Estate liquidity**
- **Taxes on first and last death**
- **Disability**
- **Critical illness**
  Four levels of comfort.
- **Long-term care**
- Investor Profil: for universal life contract

Details and Specifics of the Analyses.

Shareholder and key employee needs in life and critical illness insurance.

BNA
Business Needs Analysis



Features and Calculations

- Legal structure
- Organizational chart
  Shareholders, subsidiaries
- Taxes on first and last death
- Commitments: Leasing, commercial lease, breach of contract, related party transaction, planned gifts
- Financing of the purchase or repurchase of shares / participation
- Guarantee by the shareholde

Another Advantage

During the submission of the proposal, insurers may require your analysis report, and with BNA, our users mention that it makes the task easier and that underwriters like the explanations provided by this report.

Details and Specifics of the Analyses.

The Investment Needs Analysis creates an understanding of the client's risk tolerance for each of the plans in their portfolio.

INA
Investment
Needs Analysis

Features and Calculations

- Creation of portfolios according to the 5 risk ratings
- Includes all types of products offered by both mutual fund companies and insurance companies.
- Investor profile
- Fund facts automatically added
- Investment and regular deposit or withdrawal calculator
- Explanation of the advisor's compensation remuneration mode

Facilitates Advisor Compliance !

A Support Service to Help the Advisors

At maxomsoft, we understand the importance for financial advisors to get the help they need quickly.

Whether it be to check your current client file, or for any other questions, you will easily get the support you need.

Security of Our Systems

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Maxomsoft offers an environment that meets the highest standards in terms of security.

Maxomsoft has implemented policies, processes, and procedures to ensure security throughout the software development lifecycle.

Microsoft Azure

Whether it's through third-party penetration testing, systematic codebase reviews by peers, or security training for developers, Maxomsoft continuously reinforces its software security practices.

Hosted in Canada

Our system is fully hosted in Canada on the Microsoft Azure cloud and utilizes the offered tools.

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