

# Intelligently Budget, Forecast & Plan

With PlanGuru, you can help build the necessary forecasts for funding or an exit, **but ALSO help multiple clients grow and become more profitable.**

In just a few hours each month, you'll be able to better advise your clients with budget vs actual reporting, rolling forecasts, and scenario planning. By providing this type of service offering with PlanGuru, you'll be able to attract and build a stable of **engaged clients that will increase your recurring income.**

## Know where your business stands, and where it's headed

←→ Cash Flow Projections

Operational Budgets

Rolling Forecasts

Scenario Planning

Strategic Planning

Debt Modeling



### Powerful 3-Way Forecasting & Reporting

- > Both Cloud & Desktop Apps available
- > Import up to 5 years of historical data directly from:



- > Build an Unlimited # Projections Per Company
- > Budget / Forecast for up to 10 years
- > Quick Access to Actual, Budget, and Rolling Forecast Scenarios
- > Pre-built 3-Way Integrated Financial Statement Structure
- > Automatically solved Cash Flow Statement
- > 20+ Standard Forecasting Methods
- > Ability to Create Custom Methods
- > Forecast using Non-Financial Data and KPI's
- > Notes Payable and Line of Credit Tools



- > Customizable KPI Dashboards & Reports that provide true BI
- > View Reports detailing Budget vs Actual vs Forecast
- > Provide Colleagues or Clients Access to Full Modeling Tools or simply Dashboards & Reports

**\$99/mo.**

*Includes 3 Clients, Additional Clients \$29/mo.*

Video Tutorials

planguru® **UNIVERSITY**  
Includes 7 FREE CPE

Premium Support