

## Financial Planning Association and Omyen Corp. Announce Strategic Collaboration

FPA members to receive discounts for Omyen Corp.'s unique financial planning and client acquisition technologies



WESTWOOD, Mass. and DENVER, September 17, 2012 /PRNewswire-iReach/ -- [Omyen Corp.](#) and the [Financial Planning Association](#)® (FPA®) announced today an agreement that will license Omyen's different technology platforms – including financial planning, client acquisition, workplace advice and guidance technologies – at discounted prices for its members. Omyen specializes in developing intuitive technologies for comprehensive financial planning and client education, making it a perfect addition to the FPA Practitioner Resource Guide, a robust directory of solutions and benefits to help FPA members move their businesses forward.

Advisors are continuously challenged about efficiently developing financial plans for their clients in different life stages. Omyen's Wealth Planner's scalable design offers an intuitive and efficient approach to cash flow based comprehensive financial planning. It allows financial advisors to offer a prescriptive financial plan to younger clients within minutes. For clients nearing retirement, the Wealth Planner is equipped with the industry's first client specific retiree healthcare expense planning to develop a sustainable retirement income. Advisors have a choice of either using the standard asset allocation or using their custom allocation models. Along with covering all aspects of financial planning, the Wealth Planner also provides detailed cash flow and other financial projections.

FPA members seeking new clients can utilize Omyen's Personal Financial Index™ (PFI) technology for their targeted client acquisition. This advisor-branded tool takes about 10 minutes to educate prospective clients on their overall financial health via PFI score and motivates them to work with the advisor. From search engines to centers of influence, the PFI allows advisors to get qualified leads from different channels, collaborate with prospective clients, and improve compliance. The client information automatically flows into the Wealth Planner to avoid the reentry of data.

Financial advisors who work with retirement plan sponsors continuously need to effectively educate plan participants and efficiently offer 1:1 guidance. The advisor branded PFI provides retirement and lifetime financial education. Additionally, Omyen's Retirement Savings Planner generates participant specific retirement savings plan with suitable asset allocations across a plan's investment choices. Advisors can deliver the retirement plans to participants either face to face or in an automated fashion.

"We are excited to bring Omyen's efficient and client-friendly Wealth Planner to FPA members so they can access a high quality tool that will enhance their practices," said Dinesh Sharma, CFP®, Omyen Corp. CEO. "Planners appreciate innovative applications like this and they can also use the PFI benchmark as a revealing and informative supplement to their client discovery process," noted Sharma.

"FPA is committed to help its members grow and thrive professionally by providing them with access to the latest in practice management tools," said Lauren M. Schadle, CAE, FPA's Associate Executive Director and COO. "FPA members will now have a cost effective option to leverage Omyen's financial planning and workplace technologies to more effectively guide their clients," added Schadle.

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**About Omyen Corp.**

Based in Westwood, MA, Omyen, a recognized innovator of intuitive and affordable technologies, helps advisors effectively acquire their targeted clients and efficiently create actionable financial plans. Omyen's unique products include the Wealth Planner for client centric comprehensive financial planning and featuring the industry's first retiree healthcare planning capability, the Personal Financial Index™ for client education/acquisition, and the Retirement Savings Planner for advisors working with retirement plans. For more information about Omyen Corp, visit <http://www.omyen.com>.

**About Financial Planning Association**

The Financial Planning Association® (FPA®) is the largest membership organization for personal financial planning experts in the U.S. and includes professionals from all backgrounds and business models. FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. Based in Denver, Colo., FPA works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations. For more information about FPA, visit [www.FPAnet.org](http://www.FPAnet.org) or call 800.322.4237.