



Media Contact:
OMYEN Marketing
(617) 4-OMYEN-1
marketing@omyen.com

OMYEN Adds Advanced Planning Features to Free Social Security Maximizer™ and Announces Social Security Marketing Program

Financial advisors can now model government pensions, children's benefits, and lump-sum payments in Social Security Maximizer™, and use branded Social Security Checkup tool for educational marketing.

WESTWOOD, Massachusetts, August 7 2014 /PRNewswire/ -- Financial planning technology leader OMYEN Corp. has made significant upgrades to its free Social Security Maximizer™ software. These enhancements will allow advisors to handle all types of client situations. This upgrade includes handling of:

- Windfall Elimination (WEP) Provision for clients who may be eligible for government pensions and Social Security,
- Government Pension Offset program that affects spousal benefits for clients with government pensions,
- Lump-sum payment option that allows Social Security recipients to claim benefits in retrospect under certain conditions, and
- Retirement income gap analysis against projected retirement expenses.

New Tool: Social Security Checkup

OMYEN also announced a new Social Security tool for consumer education and lead generation. The new tool named [Social Security Checkup](#) sits on advisor websites and allows prospective clients to get a basic estimate of Social Security benefits and how those benefits compare with expected retirement expenses. This tool is an integral part of OMYEN's [Social Security marketing program](#) to help financial advisors effectively educate and acquire clients in 55 – 65 age group. Beside a branded version of **Social Security Checkup** software, this program also includes branded marketing collateral and branded client reports. Using this program, advisors can effectively engage their prospective baby boomer clients. This program is integrated with the [Social Security Maximizer™](#) (that advisors use for in-depth Social Security planning) to avoid any data reentry.

OMYEN's Social Security Marketing program is a product independent program. **With millions of Baby-boomers retiring, I want to take advantage of this tool to effectively engage them and differentiate my services.**”, said Don Hartmann of Centennial, CO based Hartmann Financial Advisors, a pilot user of the program.

Seamless Integration

The Social Security Checkup tool is tightly integrated with the Social Security Maximizer™ and OMYEN's other planning technologies. This means that any information entered by a prospective client readily flows into OMYEN's suite of planning products helping advisors gain substantial efficiencies. **“I like the fact that OMYEN is focusing on helping advisors both efficiently plan as well as to grow their business.”**, said Ray Shreder, President of The Wealthcare Center, a comprehensive financial advisory firm based in Henderson, NV. **“I also like their seamless integration that requires no rekeying of data. That's why I subscribe to their entire technology platform.”**, added Shreder.

A Turnkey Program

Financial advisors can take advantage of this turnkey marketing program to grow their client and asset base. The program consists of four steps:

- **Reach out**
- **Educate**
- **Plan, and**
- **Increase the “share of wallet”**

This program allows financial advisors to quickly invite an already interested pool of prospective clients for online, on the air, or in-person events. The educational material of the program allows advisors to effectively move prospects to the next step. An easy to understand benefits estimate from Social Security Checkup tool motivates them to inquire about Social Security planning and other financial services.

OMYEN's Other Client Education & Marketing Programs

The Social Security Checkup is also a good companion to the [Personal Financial Index® \(PFI\)](#) that advisors use for client education and acquisition. Advisors that are interested in getting clients in 55 – 65 age group may also consider OMYEN's turnkey marketing and planning program on retiree healthcare. **“Advisors who have been using OMYEN's PFI program for marketing to 35-55 year olds can use Social Security marketing program to expand their reach across all age groups.”**, said Dinesh Sharma, CEO of OMYEN.

Availability

The Social Security Marketing program is readily available at a promotional price of only \$299 per year. OMYEN provides branding and configuration specifications. These specifications help advisors to create a customized experience for their prospective clients. Financial advisors can sign up for this program by emailing their request to marketing@omyen.com, or by calling OMYEN at (617) 4-OMYEN-1. This program does not affect financial advisors' free access to Social Security Maximizer™.

About OMYEN Corp.

Based in Westwood, MA, OMYEN, a recognized innovator of intuitive and affordable technologies, helps financial advisors effectively acquire their targeted clients and efficiently create actionable financial plans. OMYEN's unique [products](#) include the [Wealth Planner™](#) for client centric financial planning and featuring the industry's first [retiree healthcare planning](#) capability, the [Personal Financial Index®](#) for client education/acquisition, [Enterprise Retirement Planner](#) for advisors working with retirement plans, and [Client Information Center](#) (an advisor branded client portal). Employers use OMYEN's intuitive [financial education and communication](#) platform to help their employees take charge of their finances. Most OMYEN technologies have been reviewed by FINRA and also approved by compliance departments of some large Broker/Dealer firms. For more information about OMYEN Corp., visit <http://www.omyen.com>.

####