

Comparison of Social Security Explorer and Social Security Pro

	Social Security Explorer	Social Security Pro
Presentation in PDF for easy emailing and archiving		✓
Input client birth dates for true calendar year calculations		✓
Can run it on iPhone and most other modern smart phones! For when you just happen to get into a Social Security discussion...		✓
Ability to handle scenarios when one spouse has already filed		✓
Relative values of best solution at every age combination		✓
Early survivor benefits (age 60 - 61) for widows		✓
Additional strategy for widowed; file for own benefits then switch to survivor's benefits at full retirement age		✓
Ability to compare benefits at various start ages and compare with the chosen strategy		✓
Graphs and report show calendar year values		✓
Robust detailed "Action Plan" – Clients will know what actions to take and when to do it, and why		✓
Monthly benefits ledger (download to Excel)		✓
Professionally designed, printed presentation that your clients will understand		✓
Action Plan available for the print report		✓
Customizable Broker/Dealer information		✓
Mid-year benefit changes displayed		✓
Professional advisor branding service available for an additional fee		✓
All combinations of filing, file and suspend, and filing restricted considered	✓	✓
All charts and graphs are easy to understand and enhance client understanding	✓	✓
Engaging interactive presentation, great for use with clients	✓	✓
All combinations of ages 62 through 70 considered	✓	✓
Single, married, widowed, divorced status	✓	✓

	Social Security Explorer	Social Security Pro
Spousal benefits	✓	✓
Survivor benefits	✓	✓
Breakeven comparison	✓	✓
WEP & GPO adjustments (Simplest, easiest most comprehensive adjustments—automatic maximum adjustment shown)	✓	✓
Selectable Social Security benefits COLA	✓	✓
Ledger showing hypothetical income taxation of benefits	✓	✓
Embedded links to Social Security Administration websites	✓	✓
Comparison of benefits: Filing Early vs. Filing Late	✓	✓
Can compare benefits as Cumulative, Present Value, or Future Value	✓	✓
Customizable discount rate (present value)	✓	✓
Share Social Security filing strategy with other PlanFacts apps	✓	✓
Patented interactive user interface	✓	✓
Strategy filing details	✓	✓
Printed client report	✓	✓
Easy to understand longevity estimates—based on how long your client is comfortable illustrating—not averages	✓	✓
Live telephone and email software support	✓	✓
Monday Mastery Series Webinars provided free of charge	✓	✓
14-day free trial subscription	✓	✓
Monthly or Discounted Annual Subscriptions	✓	✓
Runs on desktop computers, notebooks, iPads	✓	✓