In this user guide we will demonstrate how to build a Traditional Advanced Plan and What-If.

Use the Advanced Plans area to build plans to hypothetically change a client's Facts set while preserving the integrity of those Base Facts. The Advanced Plans can be used to create any number of customized plans for a client. A variety of “What If” Scenarios can be used that will allow stress tests to the Plan or Base Facts.

1. From the Client tab, click Plans and select Add to create a new Scenario.
2. Use the **Advanced Plan** area to create a hypothetical scenario or propose an idea/information. To start working in your Advanced Plan, click on the **plan** and select **Advanced Planning** or click the **AP** button.
3. The other option is to add a What-If scenario.

For example, the “**What-If Premature Death**” changes the age of death to see if the plan still works if the client dies prematurely. Or the “**Bear Market What If**” can be used to make sure a new spending plan would still work in the event of a bear market. **What-Ifs** include the ability to change variables such as age of death, creating a disability event, changing retirement age, and several others. These are a simple way to “stress-test” a plan or base facts.
4. After adding a new Advanced Plan, **Name** the Plan and click **Save**.

5. Click the **Planning Techniques** dropdown to create changes. Once a Planning Technique has been created, they can be enabled and disabled using the checkbox provided in front of the fact change.
6. Choose to **Add a New Fact**, **Make Changes to** an existing fact, or **Remove** an existing fact.

Please Note: To return back to the current plan, click **Plan Changes**.
7. Use Common Techniques to add a common technique, such as trusts, a planned gift, a partnership, a life insurance policy, a buy or sell transaction, or a reinvestment transaction to the client's plan.
Use the **Reports** section to view reports and compare the Base Facts and Advanced Plan in one of the reports listed without leaving the Plans area.

8. **Click a Report Name.**

![Advanced Planning](https://via.placeholder.com/150)

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Please Note:

Click **Add/Remove Reports** to customize the list of reports that appear in the left navigation bar. If the desired report is not in the Report Area on the left and you do not want to add it to the quick list, you can always use the full Report section to find the full list of reports.
9. The **Cash Flow** report can compare the Plan to Base Facts. Select **Base Facts** or a particular Plan from the dropdown and click **Update**.

By viewing the different reports in comparison mode, you can see the effect the proposed plan changes have for the client.