

## Software Options for Recommended Reports

### Social Security Election Report:

- Social Security Timing: [www.socialsecuritytiming.com](http://www.socialsecuritytiming.com) or [www.covisum.com](http://www.covisum.com) (20% discount via AFEA).
- Social Security Analyzer: <https://www.ssanalyzer.com>
- Horsesmouth: <https://www.horsesmouth.com/mktgpage/social>
- Any other Social Security calculation software that is 2015 Bi-Partisan Budget Act compliant.

### Tax Forcast Report:

- 1040 Tax What If: <http://www.seniortaxsolutions.com/sign-up3.html>
- Tax Clarity: <http://www.covisum.com/tax-clarity> (20% discount via AFEA).
- Retirement Analyzer: <https://www.retirementanalyzer.com> (use coupon code: AFEA for future discounts)
- Emoney: <https://emoneyadvisor.com>

### Retirement Ready or Not Report:

- Retirement Analyzer: <https://www.retirementanalyzer.com> (use coupon code: AFEA for future discounts)
- Emoney: Emoney: <https://emoneyadvisor.com>
- Retireup Pro: <https://www.retireup.com>
- Money Guide Pro: <http://www.moneyguidepro.com>
- Wealthy & Wise: <https://www.insmark.com/products/wealthy-and-wise-system>
- Income Insight: (Coming Soon) [www.covisum.com](http://www.covisum.com) (20% discount Via AFEA) – anticipated launch – 12/2018.
- Any other income planning tool that use an actual tax calculation or allows the use of an effective tax calculation. Using a marginal only results in significant excess tax consequences and cause the plan to run out of money too quickly not accurately depicting a students situation.

### True Asset Allocation and Risk Report:

- New.M.A.P. – only available with AFEA membership – Included
- Bucket Plan – only available to Clarity to Prosperity members.

### Risk only Reports:

- Riskalyze: <https://www.riskalyze.com/>
- Smart Risk: <http://www.covisum.com/smartrisk> (20% discount via AFEA)
- Hidden Levers: <https://www.hiddenlevers.com/plans>