

MoneyGuidePro Field Mappings

Household

| MGP Fields | CRM Fields Person 1 | CRM Fields Person 2 | Location in CRM |
|------------------|-----------------------------|------------------------|--|
| Participant | | | |
| Marital Status | Marital_Status_Person_1 | N/A | Record > Details > Profile Information |
| Client FirstName | First Name Person 1 | First Name Person 2 | Record > Details > Profile Information |
| Client LastName | Last Name Person 1 | Last Name Person 2 | Record > Details > Profile Information |
| DOB | DOB Person 1 | DOB Person 2 | Record > Details > Profile Information |
| State | State_of_Residence_Person_1 | N/A | Record > Details > Contact Information |
| Email | Email_Record | Email_Primary_Person_2 | Record > Details > Contact Information |
| Sex | Gender_Person_1 | Gender_Person_2 | Record > Details > Profile Information |

Asset Information

| MGP Fields | CRM Fields | Location in CRM |
|------------------|--------------------------------------|--|
| Current Value | Pulled from total of Positions value | Record > Financials > Assets/Liabilities > Assets Grid |
| Name/Description | Asset_Name | Record > Financials > Assets/Liabilities > Assets Grid |

Holdings/Position Information

| MGP Fields | CRM Fields | Location in CRM |
|---------------------|---------------------------|---|
| Holdings | Positions | Record > Financials > Assets > Positions Grid |
| Name or Description | Positions > Name | Record > Financials > Assets > Positions Grid |
| Symbol | Positions > Symbol | Record > Financials > Assets > Positions Grid |
| Value | Positions > MarketValue | Record > Financials > Assets > Positions Grid |
| Units | Positions > NumberOfUnits | Record > Financials > Assets > Positions Grid |

Insurance Information

| MGP Fields | CRM Fields | Location in CRM |
|-------------------|--------------------------|---------------------------------|
| Amount | Premium | Record > Financials > Insurance |
| PremiumFrequency | Premium Frequency | Record > Financials > Insurance |
| EliminationPeriod | LongTermCare Wait Period | Record > Financials > Insurance |
| CashValue | Cash_Value | Record > Financials > Insurance |
| Name/Description | Plan Name | Record > Financials > Insurance |
| AsOfDate | Policy Date | Record > Financials > Insurance |
| Death Benefit | Current Death Benefit | Record > Financials > Insurance |