
How to get your 'ePlan-FREE for Life' account?

Register and login – It's easy and fast. Once you are logged in then ...

Just 5 clicks and you are on!

1. Click on the logo  at the Home Page
 2. Click on 
 3. Click on [Checkout](#)
 4. Agree to the 'Terms of Service' by checking the box and then click 
 5. Click on  at top right corner of the page and [Start](#)
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How to use ePlan?

Very Important Instruction: Use Firefox or Chrome browser only

1. Register or click on 'Login' at top right corner.
2. On successful login you will be taken to the home page.
3. Click 'My Account' at top right corner.
4. Click on 'Start' (when you are going to use it for the first time) or 'Resume – Data entry' in the centre of the screen.
5. This will take you to the 'live' planning profiler or Life Profiler (LP).
6. Start filling in details and you are on your way to creating your financial plan.
7. Go through each and every field of the profiler and fill in data wherever mandatory or applicable.
8. Once you are done with a profiler, remember to click on '**Next**' button at the bottom right corner of the screen. This action will ensure that all changes that you have made are saved properly. Once you have saved all the changes you can close the screen and log out if you wish. Anytime in future you can come back and login to resume data entry.
9. While entering data in the profilers please follow the instructions and guidelines, wherever mentioned.
10. It is recommended that you make use of 'Comment' section, which is there with every profiler, to mention anything which you would like to refer later.
11. Once you are done with all the profilers, you will land up at 'Solution Summary'. This is the area where all the simulations will take place.
12. While going through the 'Life Profilers' (there are 17 altogether) please remember that you can very well go forward and backward within the profilers as and when you feel. Let me repeat here: Once you are done with a profiler remember to click on 'Next' button at bottom right corner of the screen. Only this action will ensure that all changes that you have made are saved properly.
13. CAUTION: Spend time at Solution Summary and do not rush to 'Generate Report'. Instead try different simulations, see the output and check whether you are comfortable with the final figures.

14. Once you are satisfied with the output results shown in the Solution Summary, first click 'Print Your Profiler' (this way you will retain a copy of the filled-in Life Profilers) and then click on 'Generate Report'.

15. We hope that you will enjoy this amazing experience and also share it with your family members. Let them also get involved and make the most of this 100% online, live, real time financial planning. If you wish you can upgrade to **ePlan-Customised** to harness the expertise of Transcend Planners in formulating the best fit strategies for you and your family. Here's an opportunity to optimize and unleash the true power of ePlan – All the very best!