

PRECISEFP / PRACTIFI MAPPING TABLE

Important Information

When searching for Practifi Contacts, make sure that your contact is the "Primary Contact" of the Household. Co-clients cannot be the "Primary Contact".
 The integration will export PreciseFP Clients and Prospects as "Clients" in Practifi. Prospects will be labeled as "Onboarding".
 The integration heavily relies on the "Code" attribute for "Categories" and "Types". Visit your Practifi settings to manage your "Categories".

Practifi Section	PreciseFP Section		Comments
Accounts	Household		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Account Name	<i>Client/Prospect Account Name</i>	Yes	
Record Type	<i>Client</i>	Yes	
Entity Type	<i>CETHSHLD</i>	Yes	
Stage	<i>Client or Onboarding</i>	Yes	

Practifi Section	PreciseFP Section		Comments
Contacts	Client/Co-client		<i>Integrates records where the Clients are the "Primary Contact" and Co-clients are not "the "Primary Contact"</i>
Practifi Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Middle Names	Client Details/Personal Details/Middle Initial		
Email	Client Details/Contact Details/Email	Yes	
Mobile Phone	Client Details/Contact Details/Mobile Phone		
Birth Date	Client Details/Personal Details/Birthdate		
Sex	Client Details/Personal Details/Gender		
Home Phone	Client Details/Contact Details/Home Phone		
Business Phone	Client Details/Contact Details/Work Phone		
Marital Status	Client Details/Personal Details/Marital Status		
Mailing Street	Client Details/Contact Details/Address		
Mailing City	Client Details/Contact Details/Address		
Mailing Postal Code	Client Details/Contact Details/Address		
Mailing State	Client Details/Contact Details/Address		
Mailing Country	Client Details/Contact Details/Address		
Title	Employment&Income/Employment/Job Position		
Employer	Employment&Income/Employment/Employer		
Contact Description	Client Details/Other Information/Comments		

Practifi Section	PreciseFP Section		Comments
Contacts	Children		<i>Integrates records that are not "Primary Contact" and have a Relationship Code of "RTDEPEND", "CLPDAUGHT", or "CLPSON"</i>
Practifi Field	PreciseFP Field	Required	Comments
First Name	Family Members/Children/First Name	Yes	
Last Name	Family Members/Children/Last Name	Yes	
Middle Names	Family Members/Children/Middle Initial		
Email	Family Members/Children/Email	Yes	
Birth Date	Family Members/Children/Birthdate		
Sex	Family Members/Children/Gender		
Mobile Phone	Family Members/Children/Phone		
Mailing Street	Family Members/Children/Address		
Mailing City	Family Members/Children/Address		
Mailing Postal Code	Family Members/Children/Address		
Mailing State	Family Members/Children/Address		
Mailing Country	Family Members/Children/Address		

Practifi Section	PreciseFP Section		Comments
Contacts	Other Family Members		<i>Integrates records that are not "Primary Contact" and have Relationship Code of "CLPNERLATIV"</i>
Practifi Field	PreciseFP Field	Required	Comments
First Name	Family Members/Other Family Members/First Name	Yes	
Middle Names	Family Members/Other Family Members/Middle Initial		
Last Name	Family Members/Other Family Members/Last Name	Yes	
Email	Family Members/Other Family Members/Email	Yes	
Birth Date	Family Members/Other Family Members/Birthdate		
Sex	Family Members/Other Family Members/Gender		
Mobile Phone	Family Members/Other Family Members/Phone		
Mailing Street	Family Members/Other Family Members/Address		

Mailing City	Family Members/Other Family Members/Address	
Mailing Postal Code	Family Members/Other Family Members/Address	
Mailing State	Family Members/Other Family Members/Address	
Mailing Country	Family Members/Other Family Members/Address	

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Personal Property		Integrates records where the Type is "PFLOASSET" and Category is "PHTASFAMHOME", "PHTASHOLHOME", "PHTASPERSOVA", or "PHTASMOTOVE"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	See comments	Yes	PreciseFP Property Type Practifi Portfolio Holding Category
Portfolio Holding Type	PFLOASSET	Yes	Primary Residence PHTASFAMHOME
Stage	HLDOWND	Yes	Secondary Residence PHTASHOLHOME
Owner	ACCOUNT	Yes	Collectible PHTASPERSOVA
Description	Assets/Personal Property/Name		Vehicle PHTASMOTOVE
Notes	Assets/Personal Property/Owner		
Initial Value	Assets/ Personal Property/Purchase Value		
Current Value	Assets/ Personal Property/Current Value		

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Business Assets		Integrates records where the Type is "PFLOASSET" and Category is "PHTASBIZEQUI"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	PHTASBIZEQUI	Yes	
Portfolio Holding Type	PFLOASSET	Yes	
Stage	HLDOWND	Yes	
Owner	ACCOUNT	Yes	
Description	Assets/Business Assets/Name		
Notes	Assets/Business Assets/Owner		
Current Value	Assets/Business Assets/Current Value		

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Other Assets		Integrates records where the Type is "PFLOASSET" and Category is "PHTASOTHERAS"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	PHTASOTHERAS	Yes	
Portfolio Holding Type	PFLOASSET	Yes	
Stage	HLDOWND	Yes	
Owner	ACCOUNT	Yes	
Description	Assets/Other Assets/Name		
Notes	Assets/Other Assets/Owner		
Current Value	Assets/ Other Assets/Current Value		

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Credit Cards		Integrates records where the Type is "PFLOLIABILIT" and Category is "PHTLICREDCAR"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	PHTLICREDCAR	Yes	
Portfolio Holding Type	PFLOLIABILIT	Yes	
Stage	PHSFNCD	Yes	
Repayment Frequency	Monthly	Yes	
Owner	ACCOUNT	Yes	
Description	Liabilities/Credit Cards/Name		
Notes	Liabilities/Credit Cards/Owner		
Interest Rate	Liabilities/Credit Cards/Interest Rate		
Current Value	Liabilities/Credit Cards/Current Balance		

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Mortgages		Integrates records where the Type is "PFLOLIABILIT" and Category is "PHTLIFAHOMOR", "PHTLIHOLHMMO" or "PHTLIINVPRMO"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	PHTLIFAHOMOR (for export only)	Yes	PreciseFP Interest Type Practifi Interest Type
Portfolio Holding Type	PFLOLIABILIT	Yes	ARM INTTYPVAR
Stage	PHSFNCD	Yes	FIXED INTTYPFXT
Repayment Frequency	Monthly	Yes	Int Only RPYTINTONLY
Owner	ACCOUNT	Yes	
Description	Liabilities/Mortgages/Name		
Acquisition Date	Liabilities/Mortgages/Start Date		
Notes	Liabilities/Mortgages/Owner		

Interest Rate	Liabilities/Mortgages/Interest Rate	
Interest Type	See comments	
Repayment Type	See comments	
Current Value	Liabilities/Mortgages/Current Balance	

Practifi Section	PreciseFP Section		Comments
Assets and Liabilities	Loans		Integrates records where the Type is "PFLOLIABILIT" and Category is "PHTLIMOVLOAN", "PHTLIPERSLOA", "PHTLILINOCRE", or "PHTLILEASEHP"
Practifi Field	PreciseFP Field	Required	Comments
Portfolio Holding Category	See comments	Yes	PreciseFP Loan Type Practifi Portfolio Holding Category
Portfolio Holding Type	PFLOLIABILIT	Yes	Auto PHTLIMOVLOAN
Stage	PHSFNCD	Yes	Business PHTLILEASEHP
Repayment Frequency	Monthly	Yes	Credit Line PHTLILINOCRE
Owner	ACCOUNT	Yes	Personal Note PHTLIPERSLOA
Description	Liabilities/Loans/Name		
Acquisition Date	Liabilities/Loans/Start Date		
Notes	Liabilities/Loans/Owner		
Interest Rate	Liabilities/Loans/Interest Rate		
Current Value	Liabilities/Loans/Current Balance		

Practifi Section	PreciseFP Section		Comments
Cashflows	Salary and Tips		Export only
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINSALARY	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Employment Income	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Self-employment		Export only
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINSALARY	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Description	Self-employment	Yes	
Initial Amount	Employment & Income/Annual Income/Self-Employment Income	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Pensions and Annuities		Export only
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINPENSIO	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Pensions and Annuities Income	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Social Security		Export only
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINSOCSEC	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Social Security Income	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Cash Dividends		Export only
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINDIVIDE	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Cash Dividends	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Interest		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLININTERE	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Interest	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Other Income		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLINOTHAX	Yes	
Cashflow Frequency	Yearly	Yes	
Cashflow Type	INCOME	Yes	
Client	ACCOUNT	Yes	
Initial Amount	Employment & Income/Annual Income/Other Income	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Rent		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXRENT	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Rent	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Alimony		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXOTHERE	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Alimony	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Alimony	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Child Support		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXOTHERE	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Child Support	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Child Support	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	College Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXSCHFEE	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/College Expenses	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Life Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSLIF	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Life Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Health Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	

Description	Health Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Health Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Disability Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Disability Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Disability Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Long Term Care Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Long Term Care Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Long Term Care Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Homeowner's Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Homeowners Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Homeowner's Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Auto Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Auto Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Auto Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Umbrella Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Umbrella Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Umbrella Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	E&O / Malpractice Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	E&O / Malpractice Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/E&O / Malpractice Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Cashflows	Other Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXINSOTH	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Other Insurance	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Other Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	College Fund Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXSAVING	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	College Fund Contributions	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/College Fund Contributions	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Annuity Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXSAVING	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Annuity Contributions	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Annuity Contributions	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Retirement Plan Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXSAVING	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Retirement Plan Contributions	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Retirement Plan Contributions	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Credit Card Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXCREDECA	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Credit Card Payments	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Mortgage Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXCREDECA	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Mortgage Payments	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Loan Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXPERLOA	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Loan Payments	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Other Fixed Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXOTHERE	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Other Fixed Expenses	Yes	

Practifi Section	PreciseFP Section		Comments
Cashflows	Variable Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Cashflow Category	CAFLEXOTHERE	Yes	
Cashflow Frequency	Monthly	Yes	
Cashflow Type	EXPENSE	Yes	
Description	Variable Expenses	Yes	

Initial Amount	Cash Flow & Net Worth/Monthly Cash Flow/Total Variable Expenses	Yes	
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Practifi Section	PreciseFP Section		Comments
Goal	Goal: Retirement		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Retirement/Type	Yes	
Amount	Goals/Retirement/Savings Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/Retirement/For		
Type	GTRERMNT	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Travel		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Travel/Description	Yes	
Amount	Goals/Travel/Annual Amount Needed	Yes	
Frequency	GFANUALLY	Yes	
Person	Goals/Travel/For		
Priority	Goals/Travel/Priority		
Type	GTLFSTYLE	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Wedding		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Wedding	Yes	
Achieve By	Goals/Wedding/Year		
Amount	Goals/Wedding/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/Wedding/For		
Priority	Goals/Wedding/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Celebration		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Celebration/Description	Yes	
Achieve By	Goals/Celebration/Year		
Amount	Goals/Celebration/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/Celebration/For		
Priority	Goals/Celebration/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: College		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	College	Yes	
Achieve By	Goals/College/Start Year		
Amount	Goals/College/Annual Amount Needed	Yes	
Frequency	GFANUALLY	Yes	
Person	Goals/College/For		
Priority	Goals/College/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Private School		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Private School	Yes	
Achieve By	Goals/Private School/Start Year		
Amount	Goals/Private School/Annual Amount Needed	Yes	
Frequency	GFANUALLY	Yes	
Person	Goals/Private School/For		
Priority	Goals/Private School/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
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Goal	Goal: New Business		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/New Business/Description	Yes	
Achieve By	Goals/New Business/Year		
Amount	Goals/New Business/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/New Business/For		
Priority	Goals/New Business/Priority		
Type	GTINVSTMNT	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: New Home		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/New Home/Description	Yes	
Achieve By	Goals/New Home/Year		
Amount	Goals/New Home/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/New Business/For		
Priority	Goals/New Business/Priority		
Type	GTINVSTMNT	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Home Improvement		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Home Improvement/Description	Yes	
Achieve By	Goals/Home Improvement/Year		
Amount	Goals/Home Improvement/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/Home Improvement/For		
Priority	Goals/Home Improvement/Priority		
Type	GTINVSTMNT	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Major Purchase		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Major Purchase/Description	Yes	
Achieve By	Goals/Major Purchase/Year		
Amount	Goals/Major Purchase/Amount Needed	Yes	
Frequency	GFSNGL	Yes	
Person	Goals/Major Purchase/For		
Priority	Goals/Major Purchase/Priority		
Type	GTINVSTMNT	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Provide Care		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Provide Care/Description	Yes	
Achieve By	Goals/Provide Care/Start Year		
Amount	Goals/Provide Care/Annual Amount Needed	Yes	
Frequency	GFANUALLY	Yes	
Person	Goals/Provide Care/For		
Priority	Goals/Provide Care/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Gift or Donation		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Gift or Donation/Description	Yes	
Achieve By	Goals/Gift or Donation/Start Year		
Amount	Goals/Gift or Donation/Annual Amount Needed	Yes	
Frequency	GFANUALLY	Yes	
Person	Goals/Gift or Donation/For		
Priority	Goals/Gift or Donation/Priority		
Type	GTOTHER	Yes	

Practifi Section	PreciseFP Section		Comments
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Goal	Goal: Leave Bequest		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Leave Bequest/Description	Yes	
Amount	Goals/Leave Bequest/Amount Needed	Yes	
Frequency	<i>GFSNGL</i>	Yes	
Person	Goals/Gift or Donation/For		
Type	<i>GTOTHER</i>	Yes	

Practifi Section	PreciseFP Section		Comments
Goal	Goal: Other Goal		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Goals/Other Goal/Description	Yes	
Achieve By	Goals/Other Goal/Start Year		
Amount	Goals/Other Goal/Annual Amount Needed	Yes	
Frequency	<i>GFANUALY</i>	Yes	
Person	Goals/Other Goal/For		
Priority	Goals/Other Goal/Priority		
Type	<i>GTOTHER</i>	Yes	