

**PRECISEFP / EMONEY MAPPING TABLE**

eMoney Section	PreciseFP Section	Required	Comments
Clients	Client Details		<i>Integrates client/co-client details</i>
eMoney Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Gender	Client Details/Personal Details/Gender		
Marital Status	Client Details/Personal Details/Marital Status		<i>If present, the co-client's marital status is taking precedence on export</i>
Date of Birth	Client Details/Personal Details/Birthdate		
Address 1	Client Details/Contact Details/Address		
City	Client Details/Contact Details/Address		<i>Addresses from non-U.S. countries will not integrate.</i>
Postal Code	Client Details/Contact Details/Address		
State or Province	Client Details/Contact Details/Address		
Business Phone	Client Details/Contact Details/Work Phone		
Cell Phone	Client Details/Contact Details/Mobile Phone		
Home Phone	Client Details/Contact Details/Home Phone		
Email	Client Details/Contact Details/Email	Yes	
Employer Name	Employment & Income/Employment/Employer		
Job Title	Employment & Income/Employment/Job Position		
Years Employed	Employment & Income/Employment/No. of Years Working Here		
Employer Address	Employment & Income/Employment/Address		
Employer City	Employment & Income/Employment/Address		<i>Addresses from non-U.S. countries will not integrate.</i>
Employer Postal Code	Employment & Income/Employment/Address		
Employer State or Province	Employment & Income/Employment/Address		

eMoney Section	PreciseFP Section	Required	Comments
Salary/Bonus	Employment & Income		<i>Exports Employment Income value</i>
eMoney Field	PreciseFP Field	Required	Comments
Name	<i>Employment Income</i>	Yes	
Annual Amount	Employment & Income/Annual Income/Employment Income	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Salary/Bonus	Self-Employment Income		<i>Exports Self-Employment Income value</i>
eMoney Field	PreciseFP Field	Required	Comments
Name	<i>Self-Employment Income</i>	Yes	
Annual Amount	Employment & Income/Annual Income/Self-Employment Income	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Deferred Income	Pensions/Annuities Income		<i>Exports Pensions &amp; Annuities Income value</i>
eMoney Field	PreciseFP Field	Required	Comments
Type	<i>Pension</i>	Yes	
Name	<i>Pensions and Annuities</i>	Yes	
Annual Amount	Employment & Income/Annual Income/Pensions & Annuities Income	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Income	Dividends Income		<i>Exports Cash Dividends value</i>
eMoney Field	PreciseFP Field	Required	Comments
Name	<i>Dividends</i>	Yes	
Value	Employment & Income/Annual Income/Cash Dividends	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Income	Interest Income		<i>Exports Interest value</i>
eMoney Field	PreciseFP Field	Required	Comments
Name	<i>Interest</i>	Yes	
Value	Employment & Income/Annual Income/Interest	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Income	Social Security Income		<i>Exports Social Security Income</i>
eMoney Field	PreciseFP Field	Required	Comments
Name	<i>Social Security</i>	Yes	
Value	Employment & Income/Annual Income/Social Security Income	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments

Other Income	Other Income		Exports Other Income value
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
Name	Other	Yes	
Value	Employment & Income/Annual Income/Other Income	Yes	
Type	Other	Yes	

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
People	Children	Integrates records where Type is "Child"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
First Name	Family Members/Children/First Name	Yes	
Last Name	Family Members/Children/Last Name	Yes	
Date of Birth	Family Members/Children/Birthdate		
Gender	Family Members/Children/Gender		
Financially Dependent	Family Members/Children/Dependent		
Type	Child	Yes	

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
People	Other Family Members	Integrates records where Type is "Other"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
First Name	Family Members/Other Family Members/First Name	Yes	
Last Name	Family Members/Other Family Members/Last Name	Yes	
Date of Birth	Family Members/Other Family Members/Birthdate		
Gender	Family Members/Other Family Members/Gender		
Financially Dependent	Family Members/Other Family Members/Dependent		
Type	Other	Yes	

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
Life Insurance	Life Insurance	Integrates records where Policy Type is "Other"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
Policy Type	Other	Yes	
Policy Name	Insurance/Life Insurance/Name	Yes	
Institution Name	Insurance/Life Insurance/Provider		
Current Cash Value	Insurance/Life Insurance/Cash Value		
Current Death Benefit	Insurance/Life Insurance/Coverage Amount	Yes	
Annual Premium	Insurance/Life Insurance/Premium		
Insured	Insurance/Life Insurance/Insured		
Beneficiary (Primary)	Insurance/Life Insurance/Primary Beneficiary		
Beneficiary (Secondary)	Insurance/Life Insurance/Secondary Beneficiary		

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
Medical Insurance	Health Insurance	Integrates records where Policy Type is "Other"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
Policy Type	Other	Yes	
Policy Name	Insurance/Health Insurance/Name	Yes	
Institution Name	Insurance/Health Insurance/Provider		
Annual Premium	Insurance/Health Insurance/Premium	Yes	
Owner	Insurance/Health Insurance/Insured		

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
Disability Insurance	Disability Insurance	Integrates records where Policy Type is "Other" and Benefit Frequency is "Annually"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
Policy Type	Other	Yes	
Policy Name	Insurance/Disability Insurance/Name		
Institution Name	Insurance/Disability Insurance/Provider		
Annual Premium	Insurance/Disability Insurance/Premium	Yes	
Insured	Insurance/Disability Insurance/Insured		
Benefit Frequency	Annually	Yes	
Benefit Amount	Insurance/Disability Insurance/Coverage Amount	Yes	

<b>eMoney Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>	
LTC Insurance	Long Term Care Insurance	Integrates records where Benefit Type is "Indemnity"	
<b>eMoney Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>
Benefit Type	Indemnity	Yes	
Policy Name	Insurance/Long Term Care Insurance/Name		
Institution Name	Insurance/Long Term Care Insurance/Provider		
Annual Premium	Insurance/Long Term Care Insurance/Premium	Yes	
Insured	Insurance/Long Term Care Insurance/Insured		

Benefit Amount	0	Yes	
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eMoney Section		PreciseFP Section	Comments
P/C Insurance		Homeowner's Insurance	Integrates records where Policy Type is "Homeowners"
eMoney Field		PreciseFP Field	Required Comments
Policy Type		Homeowners	Yes
Policy Name		Insurance/Homeowner's Insurance/Name	Yes
Institution Name		Insurance/Homeowner's Insurance/Provider	
Annual Premium		Insurance/Homeowner's Insurance/Premium	Yes
Owner		Insurance/Homeowner's Insurance/Owner	

eMoney Section		PreciseFP Section	Comments
P/C Insurance		Auto Insurance	Integrates records where Policy Type is "Auto"
eMoney Field		PreciseFP Field	Required Comments
Policy Type		Auto	Yes
Policy Name		Insurance/Auto Insurance/Name	Yes
Institution Name		Insurance/Auto Insurance/Provider	
Annual Premium		Insurance/Auto Insurance/Premium	Yes
Owner		Insurance/Auto Insurance/Owner	

eMoney Section		PreciseFP Section	Comments
P/C Insurance		Umbrella Insurance	Integrates records where Policy Type is "Umbrella"
eMoney Field		PreciseFP Field	Required Comments
Policy Type		Umbrella	Yes
Policy Name		Insurance/Umbrella Insurance/Name	Yes
Institution Name		Insurance/Umbrella Insurance/Provider	
Annual Premium		Insurance/Umbrella Insurance/Premium	Yes
Owner		Insurance/Umbrella Insurance/Owner	

eMoney Section		PreciseFP Section	Comments
P/C Insurance		Other Insurance	Integrates records where Policy Type is "Other"
eMoney Field		PreciseFP Field	Required Comments
Policy Type		Other	Yes
Policy Name		Insurance/Other Insurance/Name	Yes
Institution Name		Insurance/Other Insurance/Provider	
Annual Premium		Insurance/Other Insurance/Premium	Yes
Owner		Insurance/Other Insurance/Owner	

eMoney Section		PreciseFP Section	Comments
Qualified Retirement		401(K)	Integrates records where Type is "Traditional 401(K)"
eMoney Field		PreciseFP Field	Required Comments
Type		Traditional 401(K)	Yes
Asset Name		Retirement Plans/401(K)/Name	Yes
Total Value		Retirement Plans/401(K)/Account Value	Yes
Owner		Retirement Plans/401(K)/Owner	
Beneficiary (Primary)		Retirement Plans/401(K)/Primary Beneficiary	
Beneficiary (Secondary)		Retirement Plans/401(K)/Secondary Beneficiary	
Employer Contribution		Retirement Plans/401(K)/Employer Contributions	
Employee Contribution		Retirement Plans/401(K)/Employee Contributions	

eMoney Section		PreciseFP Section	Comments
Qualified Retirement		Roth 401(K)	Integrates records where Type is "Roth 401(K)"
eMoney Field		PreciseFP Field	Required Comments
Type		Roth 401(K)	Yes
Asset Name		Retirement Plans/Roth 401(K)/Name	Yes
Total Value		Retirement Plans/Roth 401(K)/Account Value	Yes
Owner		Retirement Plans/Roth 401(K)/Owner	
Beneficiary (Primary)		Retirement Plans/Roth 401(K)/Primary Beneficiary	
Beneficiary (Secondary)		Retirement Plans/Roth 401(K)/Secondary Beneficiary	
Employer Contribution		Retirement Plans/Roth 401(K)/Employer Contributions	
Employee Contribution		Retirement Plans/Roth 401(K)/Employee Contributions	

eMoney Section		PreciseFP Section	Comments
Qualified Retirement		403(B)	Integrates records where Type is "Traditional 403(B)"
eMoney Field		PreciseFP Field	Required Comments
Type		Traditional 403(B)	Yes
Asset Name		Retirement Plans/403(B)/Name	Yes
Total Value		Retirement Plans/403(B)/Account Value	Yes

Owner	Retirement Plans/403(B)/Owner	
Beneficiary (Primary)	Retirement Plans/403(B)/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/403(B)/Secondary Beneficiary	
Employer Contribution	Retirement Plans/403(B)/Employer Contributions	
Employee Contribution	Retirement Plans/403(B)/Employee Contributions	

eMoney Section	PreciseFP Section	Comments
Qualified Retirement	IRA	Integrates records where Type is "IRA"
eMoney Field	PreciseFP Field	Required Comments
Type	IRA	Yes
Asset Name	Retirement Plans/IRA/Name	Yes
Total Value	Retirement Plans/IRA/Account Value	Yes
Owner	Retirement Plans/IRA/Owner	
Beneficiary (Primary)	Retirement Plans/IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/IRA/Secondary Beneficiary	
Employer Contribution	Retirement Plans/IRA/Employer Contributions	

eMoney Section	PreciseFP Section	Comments
Qualified Retirement	SEP IRA	Integrates records where Type is "SEP"
eMoney Field	PreciseFP Field	Required Comments
Type	SEP	Yes
Asset Name	Retirement Plans/SEP IRA/Name	Yes
Total Value	Retirement Plans/SEP IRA/Account Value	Yes
Owner	Retirement Plans/SEP IRA/Owner	
Beneficiary (Primary)	Retirement Plans/SEP IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/SEP IRA/Secondary Beneficiary	
Employer Contribution	Retirement Plans/SEP IRA/Employer Contributions	

eMoney Section	PreciseFP Section	Comments
Qualified Retirement	Pensions	Integrates records where Type is "Pension"
eMoney Field	PreciseFP Field	Required Comments
Type	Pension	Yes
Asset Name	Retirement Plans/Pensions/Name	Yes
Total Value	Retirement Plans/Pensions/Distribution Amount	Yes
Owner	Retirement Plans/Pensions/Owner	
Beneficiary (Primary)	Retirement Plans/PensionsPrimary Beneficiary	

eMoney Section	PreciseFP Section	Comments
Qualified Retirement	457(B)	Integrates records where Type is "Other"
eMoney Field	PreciseFP Field	Required Comments
Type	Other	Yes
Asset Name	Retirement Plans/457(B)/Name	Yes
Total Value	Retirement Plans/457(B)/Account Value	Yes
Owner	Retirement Plans/457(B)/Owner	
Beneficiary (Primary)	Retirement Plans/457(B)/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/457(B)/Secondary Beneficiary	
Employer Contribution	Retirement Plans/457(B)/Employer Contributions	
Employee Contribution	Retirement Plans/457(B)/Employee Contributions	

eMoney Section	PreciseFP Section	Comments
Roth IRA	Roth IRA	Integrates Rorth IRA records
eMoney Field	PreciseFP Field	Required Comments
Asset Name	Retirement Plans/Roth IRA/Name	Yes
Total Value	Retirement Plans/Roth IRA/Account Value	Yes
Owner	Retirement Plans/Roth IRA/Owner	
Beneficiary (Primary)	Retirement Plans/Roth IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/Roth IRA/Secondary Beneficiary	

eMoney Section	PreciseFP Section	Comments
529 Plans	College Funds	Integrates 529 Plan records
eMoney Field	PreciseFP Field	Required Comments
Asset Name	Assets/College Funds/Name	Yes
Total Value	Assets/College Funds/Current Balance	Yes
Grantor	Assets/College Funds/Owner	
Beneficiary (Primary)	Assets/College Funds/Beneficiary	

eMoney Section	PreciseFP Section	Comments
Cash Investments	Bank Accounts	Integrates records where Type is "Checking", "Savings" or "Money Market"

eMoney Field	PreciseFP Field	Required	Comments	
Type	See comments	Yes	<b>PreciseFP Type:</b>	<b>eMoney Type</b>
Asset Name	Assets/Bank Accounts/Name	Yes	Checking	Checking
Institution Name	Assets/Bank Accounts/Bank Name		Savings	Savings
Total Value	Assets/Bank Accounts/Average Balance	Yes	Money Market	Money Market
Owner	Assets/Bank Accounts/Owner			

eMoney Section	PreciseFP Section	Comments		
Cash Investments	CDs		Integrates records where Type is "CDs"	
eMoney Field	PreciseFP Field	Required	Comments	
Type	CDs	Yes		
Asset Name	Assets/Certificates of Deposit/Name	Yes		
Institution Name	Assets/Certificates of Deposit/Where Held?			
Total Value	Assets/Certificates of Deposit/Current Value	Yes		
Owner	Assets/Certificates of Deposit/Owner			

eMoney Section	PreciseFP Section	Comments		
Taxable Investments	Taxable Investment Accounts		Integrates Taxable Investment Account records	
eMoney Field	PreciseFP Field	Required	Comments	
Asset Name	Assets/Taxable Investment Accounts/Name	Yes		
Total Value	Assets/Taxable Investment Accounts/Current Value	Yes		
Tax Basis	Assets/Taxable Investment Accounts/Cost Basis			
Owner	Assets/Taxable Investment Accounts/Owner			

eMoney Section	PreciseFP Section	Comments		
Annuities	Annuities		Integrates records where Type is "Fixed" or "Variable"	
eMoney Field	PreciseFP Field	Required	Comments	
Type	See comments	Yes	<b>PreciseFP Annuity Type</b>	<b>eMoney Annuity Type</b>
Asset Name	Assets/Annuities/Name	Yes	Fixed	Fixed
Value	Assets/Annuities/Account Value	Yes	Variable	Variable
Owner	Assets/Annuities/Owner			

eMoney Section	PreciseFP Section	Comments		
Property	Personal Property		Integrates records where Type is "Residence", "Non-residence" or "Personal Property"	
eMoney Field	PreciseFP Field	Required	Comments	
Property Type	See comments	Yes	<b>PreciseFP Personal Property Type</b>	<b>eMoney Personal Property Type</b>
Asset Name	Assets/Personal Property/Name	Yes	Primary Residence	Residence
Value	Assets/Personal Property/Current Value	Yes	Secondary Residence	Non-residence
Owner	Assets/Personal Property/Owner		None	Personal Property
Purchase Amount	Assets/Personal Property/Purchase Value			

eMoney Section	PreciseFP Section	Comments		
Business Interests	Business Assets		Integrates records where Type is "Sole Proprietorship"	
eMoney Field	PreciseFP Field	Required	Comments	
Type	Sole Proprietorship	Yes		
Asset Name	Assets/Business Assets/Name	Yes		
Base Value	Assets/Business Assets/Current Value	Yes		
Owner	Assets/Business Assets/Owner			

eMoney Section	PreciseFP Section	Comments		
Loans	Credit Cards		Integrates records where Type is "Credit Card", Repayment Type is "Principal and Interest" and Payment Frequency is "Monthly"	
eMoney Field	PreciseFP Field	Required	Comments	
Type	Credit Card	Yes		
Repayment Type	Principal And Interest	Yes		
Payment Frequency	Monthly	Yes		
Loan Name	Liabilities/Credit Cards/Name	Yes		
Current Balance	Liabilities/Credit Cards/Current Balance	Yes		
Interest Rate	Liabilities/Credit Cards/Interest Rate			
Payment	Liabilities/Credit Cards/Payment			
Owner	Liabilities/Credit Cards/Owner			

eMoney Section	PreciseFP Section	Comments		
Loans	Loans		Integrates records where Type is "Automobile", "Personal", "Line of Credit", "Business" or "Student Loan", Repayment Type is "Principal and Interest" and Payment Frequency is "Monthly"	
eMoney Field	PreciseFP Field	Required	Comments	
Type	See Comments	Yes	<b>PreciseFP Loan Type</b>	<b>eMoney Loan Type</b>
Repayment Type	Principal And Interest	Yes	Auto	Automobile

Payment Frequency	Monthly	Yes	Personal Note	Personal
Date of Loan	Liabilities/Loans/Start Date		Credit Line	Line of Credit
Loan Name	Liabilities/Loans/Name	Yes	Business	Business
Current Balance	Liabilities/Loans/Current Balance	Yes	School Loan	Student Loan
Interest Rate	Liabilities/Loans/nterest Rate			
Payment	Liabilities/Loans/Payment			
Owner	Liabilities/Loans/Owner			
Original Loan Amount	Liabilities/Loans/Original Balance			

eMoney Section	PreciseFP Section		Comments
Mortgages	Mortgages		Integrates records where Type is "Mortgage" Repayment Type is "Principal and Interest" and Payment Frequency is "Monthly"
eMoney Field	PreciseFP Field	Required	Comments
Type	Mortgage	Yes	
Repayment Type	Principal And Interest	Yes	
Payment Frequency	Monthly	Yes	
Date of Loan	Liabilities/Mortgages/Start Date		
Name	Liabilities/Mortgages/Name	Yes	
Current Balance	Liabilities/Mortgages/Current Balance	Yes	
Interest Rate	Liabilities/Mortgages/nterest Rate		
Payment	Liabilities/Mortgages/Payment		
Original Loan Amount	Liabilities/Mortgages/Original Balance		

eMoney Section	PreciseFP Section		Comments
Living Expenses	Variable Expenses		Exports Total Variable Expenses value
eMoney Field	PreciseFP Field	Required	Comments
Current Living Expenses	Cash Flow & Net Worth/Monthly Cash Flow/Total Variable Expenses	Yes	

eMoney Section	PreciseFP Section		Comments
Education Expenses	College Expenses		Exports College Expenses value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Monthly Fixed Expenses/College Expenses	Yes	
Name	College Expenses	Yes	

eMoney Section	PreciseFP Section		Comments
Other Expenses	Expense: Rent		Exports Rent value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Monthly Fixed Expenses/Rent	Yes	
Name	College Expenses	Yes	
Type	Other	Yes	

eMoney Section	PreciseFP Section		Comments
Other Expenses	Expense: Alimony		Exports Rent value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Monthly Fixed Expenses/Alimony	Yes	
Name	Alimony	Yes	
Type	Alimony	Yes	

eMoney Section	PreciseFP Section		Comments
Other Expenses	Expense: Child Support		Exports Child Support value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Monthly Fixed Expenses/Child Support	Yes	
Name	Child Support	Yes	
Type	Family Support	Yes	

eMoney Section	PreciseFP Section		Comments
Other Expenses	Expense: Other		Exports Other Fixed Expenses value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Monthly Fixed Expenses/Other Fixed Expenses	Yes	
Name	Other Fixed Expense	Yes	
Type	Other	Yes	

eMoney Section	PreciseFP Section		Comments
Other Expenses	Expense: Federal Income Taxes		Exports Federal Income Taxes value
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Annual Taxes/Federal Income Taxes	Yes	
Name	Federal Income Taxes	Yes	
Type	Other	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Expenses	Expense: State Income Taxes		<i>Exports State Income Taxes value</i>
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Annual Taxes/State Income Taxes	Yes	
Name	<i>State Income Taxes</i>	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Expenses	Expense: FICA		<i>Exports FICA value</i>
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Annual Taxes/State Income Taxes	Yes	
Name	<i>FICA</i>	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Expenses	Expense: Real Estate Taxes		<i>Exports Real Estate Taxes value</i>
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Annual Taxes/Real Estate Taxes	Yes	
Name	<i>Real Estate Taxes</i>	Yes	
Type	<i>Other</i>	Yes	

eMoney Section	PreciseFP Section	Required	Comments
Other Expenses	Expense: Other Taxes		<i>Exports Other Taxes value</i>
eMoney Field	PreciseFP Field	Required	Comments
Annual Amount	Expenses & Taxes/Annual Taxes/Real Estate Taxes	Yes	
Name	<i>Other Taxes</i>	Yes	
Type	<i>Other</i>	Yes	