

## PRECISEFP / ASSETMAP MAPPING TABLE

**Important Information**  
 Search for Asset Map Contacts by household name. Make sure that your primary household member has a valid email address saved in Asset Map.

AssetMap Section	PreciseFP Section	Comments	
Household	Client Details		Integrates Household details
AssetMap Field	PreciseFP Field	Required	Comments
Address 1	Client Details/Contact Details/Address		
City	Client Details/Contact Details/Address		
Postal Code	Client Details/Contact Details/Address		
State or Province	Client Details/Contact Details/Address		
Country	Client Details/Contact Details/Address		

AssetMap Section	PreciseFP Section	Comments	
Members	Client Details		Integrates records with type "primary" as clients and "spouse" as co-clients
AssetMap Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Email	Client Details/Contact Details/Email	Yes	
Gender	Client Details/Personal Details/Gender		
Birthdate	Client Details/Personal Details/Birthdate		

AssetMap Section	PreciseFP Section	Comments	
Members	Children		Integrates records where Type is "Dependent"
eMoney Field	PreciseFP Field	Required	Comments
First Name	Family Members/Children/First Name	Yes	
Last Name	Family Members/Children/Last Name	Yes	
Email	Family Members/Children/Email		
Date of Birth	Family Members/Children/Birthdate		
Gender	Family Members/Children/Gender		
Type	Dependent	Yes	

AssetMap Section	PreciseFP Section	Comments	
Members	Other Family Members		Integrates records where Type is "Family"
AssetMap Field	PreciseFP Field	Required	Comments
First Name	Family Members/Other Family Members/First Name	Yes	
Last Name	Family Members/Other Family Members/Last Name	Yes	
Email	Family Members/Other Family Members/Email		
Date of Birth	Family Members/Other Family Members/Birthdate		
Gender	Family Members/Other Family Members/Gender		
Type	Family	Yes	

AssetMap Section	PreciseFP Section	Comments	
Assets	401(k)		Integrates records where Type is "Asset (Retirement)", Instrument Choice is "401(k)" and Roth Features is "false"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Asset (Retirement)	Yes	
Roth Features	false	Yes	
Instrument Choice	401(k)	Yes	
Location	401(k) from PreciseFP	Yes	
Reference Name	Retirement Plans/401(k)/Name	Yes	
Value	Retirement Plans/401(k)/Account Value	Yes	
Owner	Retirement Plans/401(k)/Owner	Yes	
Beneficiary (Primary)	Retirement Plans/401(k)/Primary Beneficiary		
Beneficiary (Secondary)	Retirement Plans/401(k)/Secondary Beneficiary		

AssetMap Section	PreciseFP Section	Comments	
Assets	Roth 401(k)		Integrates records where Type is "Asset (Retirement)", Instrument Choice is "401(k)" and Roth Features is "true"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Asset (Retirement)	Yes	
Roth Features	true	Yes	
Instrument Choice	401(k)	Yes	
Location	Roth 401(k) from PreciseFP	Yes	
Reference Name	Retirement Plans/Roth 401(k)/Name	Yes	
Value	Retirement Plans/Roth 401(k)/Account Value	Yes	
Owner	Retirement Plans/Roth 401(k)/Owner	Yes	

Beneficiary (Primary)	Retirement Plans/Roth 401(k)/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/Roth 401(k)/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
Assets	403(b)	Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "403(b)"
AssetMap Field	PreciseFP Field	Required Comments
Type	Asset (Retirement)	Yes
Instrument Choice	403(b)	Yes
Location	403(b) from PreciseFP	Yes
Reference Name	Retirement Plans/403(b)/Name	Yes
Value	Retirement Plans/403(b)/Account Value	Yes
Owner	Retirement Plans/403(b)/Owner	Yes
Beneficiary (Primary)	Retirement Plans/403(b)/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/403(b)/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
Assets	457(b)	Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "457(b)"
AssetMap Field	PreciseFP Field	Required Comments
Type	Asset (Retirement)	Yes
Instrument Choice	457	Yes
Location	457(b) from PreciseFP	Yes
Reference Name	Retirement Plans/457(b)/Name	Yes
Value	Retirement Plans/457(b)/Account Value	Yes
Owner	Retirement Plans/457(b)/Owner	Yes
Beneficiary (Primary)	Retirement Plans/457(b)/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/457(b)/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
Assets	IRA	Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "IRA"
AssetMap Field	PreciseFP Field	Required Comments
Type	Asset (Retirement)	Yes
Instrument Choice	IRA	Yes
Location	IRA from PreciseFP	Yes
Reference Name	Retirement Plans/IRA/Name	Yes
Value	Retirement Plans/IRA/Account Value	Yes
Owner	Retirement Plans/IRA/Owner	Yes
Beneficiary (Primary)	Retirement Plans/IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/IRA/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
Assets	Roth IRA	Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "Roth IRA"
AssetMap Field	PreciseFP Field	Required Comments
Type	Asset (Retirement)	Yes
Instrument Choice	IRA	Yes
Roth Features	true	
Location	IRA from PreciseFP	Yes
Reference Name	Retirement Plans/Roth IRA/Name	Yes
Value	Retirement Plans/Roth IRA/Account Value	Yes
Owner	Retirement Plans/Roth IRA/Owner	Yes
Beneficiary (Primary)	Retirement Plans/Roth IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/Roth IRA/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
Assets	Simple IRA	Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "Simple IRA"
AssetMap Field	PreciseFP Field	Required Comments
Type	Asset (Retirement)	Yes
Instrument Choice	Simple IRA	Yes
Location	Simple IRA from PreciseFP	Yes
Reference Name	Retirement Plans/Simple IRA/Name	Yes
Value	Retirement Plans/Simple IRA/Account Value	Yes
Owner	Retirement Plans/Simple IRA/Owner	Yes
Beneficiary (Primary)	Retirement Plans/Simple IRA/Primary Beneficiary	
Beneficiary (Secondary)	Retirement Plans/Simple IRA/Secondary Beneficiary	

AssetMap Section	PreciseFP Section	Comments
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Assets	SEP IRA		Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "SEP IRA"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Retirement)	Yes		
Instrument Choice	SEP IRA	Yes		
Location	SEP IRA from PreciseFP	Yes		
Reference Name	Retirement Plans/SEP IRA/Name	Yes		
Value	Retirement Plans/SEP IRA/Account Value	Yes		
Owner	Retirement Plans/SEP IRA/Owner	Yes		
Beneficiary (Primary)	Retirement Plans/SEP IRA/Primary Beneficiary			
Beneficiary (Secondary)	Retirement Plans/SEP IRA/Secondary Beneficiary			

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	Pensions		Integrates records where Type is "Asset (Retirement)" and Instrument Choice is "Pension Plan"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Retirement)	Yes		
Instrument Choice	Pension Plan	Yes		
Location	Assets/Pensions/Distribution Type	Yes		
Reference Name	Assets/Pensions/Name	Yes		
Value	Assets/Pensions/Account Value	Yes		
Owner	Assets/Pensions/Owner	Yes		
Start Date	Assets/Pensions/Distribution Year			

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	Bank Accounts		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Checking Current Account", "Money Market" or "Savings Account"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Non-Retirement)	Yes	<b>PreciseFP Type:</b>	<b>AssetMap Type</b>
Account Type	See Comments	Yes	Checking	Checking Current Account
Location	Assets/Bank Accounts/Distribution Type	Yes	Money Market	Money Market
Reference Name	Assets/Bank Accounts/Name	Yes	Savings	Savings Account
Value	Assets/Bank Accounts/Average Value			
Owner	Assets/Bank Accounts/Owner			

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	Certificates of Deposit		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Certificate of Deposit"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Non-Retirement)	Yes		
Account Type	Certificates of Deposit	Yes		
Location	Assets/Certificate of Deposit/Where held?	Yes		
Reference Name	Assets/Certificate of Deposit/Name	Yes		
Value	Assets/Certificate of Deposit/Current Value			
Owner	Assets/Certificate of Deposit/Owner	Yes		

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	Taxable Investment Accounts		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Brokerage"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Non-Retirement)	Yes		
Account Type	Brokerage	Yes		
Location	TIA from PreciseFP	Yes		
Reference Name	Assets/Taxable Investment Accounts/Name	Yes		
Value	Assets/Taxable Investment Accounts/Current Value			
Owner	Assets/Taxable Investment Accounts/Owner	Yes		

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	College Funds		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "529"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	
Type	Asset (Non-Retirement)	Yes		
Account Type	529	Yes		
Location	College Fund from PreciseFP	Yes		
Reference Name	Assets/College Funds/Name	Yes		
Value	Assets/College Funds/Current Balance			
Owner	Assets/College Funds/Owner	Yes		

<b>AssetMap Section</b>	<b>PreciseFP Section</b>	<b>Comments</b>		
Assets	Annuities		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Annuity"	
<b>AssetMap Field</b>	<b>PreciseFP Field</b>	<b>Required</b>	<b>Comments</b>	

Type	Asset (Non-Retirement)	Yes	
Account Type	Annuity	Yes	
Deferred Annuity	true		
Location	Assets/Annuities/Type	Yes	
Reference Name	Assets/Annuities/Name	Yes	
Value	Assets/Annuities/Account Value	Yes	
Owner	Assets/College Funds/Owner	Yes	

AssetMap Section	PreciseFP Section		Comments
Assets	Real Estate		Integrates records where Type is "Asset (Residence)" and Is Residence is "Yes" or "No"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Asset (Residence)	Yes	<b>PreciseFP Type</b> <b>AssetMap Is Residence value</b>
Is Residence	See comments	Yes	Primary Residence                      Yes
Location	Assets/Personal Property/Type	Yes	Secondary Residence                      No
Reference Name	Assets/Personal Property/Name	Yes	
Value	Assets/Personal Property/Current Value	Yes	
Owner	Assets/Personal Property/Owner	Yes	

AssetMap Section	PreciseFP Section		Comments
Assets	Business Assets		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Business Interest"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Asset (Non-Retirement)	Yes	
Account Type	Business Interest	Yes	
Location	Business Asset from PreciseFP	Yes	
Reference Name	Assets/Business Assets/Name	Yes	
Value	Assets/Business Assets/Current Value	Yes	
Owner	Assets/Business Assets/Owner	Yes	

AssetMap Section	PreciseFP Section		Comments
Assets	Other Assets		Integrates records where Type is "Asset (Non-Retirement)" and Account Type is "Other Assets"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Asset (Non-Retirement)	Yes	
Account Type	Other Assets	Yes	
Location	Other Asset from PreciseFP	Yes	
Reference Name	Assets/Other Assets/Name	Yes	
Value	Assets/Other Assets/Current Value	Yes	
Owner	Assets/Other Assets/Owner	Yes	

AssetMap Section	PreciseFP Section		Comments
Insurance	Life Insurance		Integrates records where Type is "Insurance (Term Life)", "Insurance (Universal Life)", "Insurance (Variable Universal Life)" or "Insurance (Whole Life)"
AssetMap Field	PreciseFP Field	Required	Comments
Type	See Comments	Yes	<b>PreciseFP Type</b> <b>AssetMap Type</b>
Reference Name	Insurance/Life Insurance/Name	Yes	Term Life                      Insurance (Term Life)
Location	Insurance/Life Insurance/Provider	Yes	Universal Life                      Insurance (Universal Life)
Cash Value	Insurance/Life Insurance/Cash Value		Variable Universal Life                      Insurance (Variable Universal Life)
Value	Insurance/Life Insurance/Coverage Amount	Yes	Whole Life                      Insurance (Whole Life)
Owner	Insurance/Life Insurance/Insured	Yes	
Beneficiary (Primary)	Insurance/Life Insurance/Primary Beneficiary		
Beneficiary (Secondary)	Insurance/Life Insurance/Secondary Beneficiary		

AssetMap Section	PreciseFP Section		Comments
Insurance	Long Term Care Insurance		Integrates records where Type is "Insurance (LTC)"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Insurance (LTC)	Yes	
Reference Name	Insurance/Long Term Care Insurance/Name	Yes	
Location	Insurance/Long Term Care Insurance/Provider	Yes	
Value	0	Yes	
Owner	Insurance/Long Term Care Insurance/Insured	Yes	

AssetMap Section	PreciseFP Section		Comments
Insurance	Disability Insurance		Integrates records where Type is "Insurance (Disability)"
AssetMap Field	PreciseFP Field	Required	Comments
Type	Insurance (Disability)	Yes	
Reference Name	Insurance/Disability Insurance/Name	Yes	
Location	Insurance/Disability Insurance/Provider	Yes	
Value	Insurance/Disability Insurance/Coverage Amount	Yes	

Owner	Insurance/Disability Insurance/Insured	Yes
Benefit Period Type	Years	
Benefit Period	1	

AssetMap Section	PreciseFP Section	Comments
Liabilities	Credit Cards	Integrates records where Type is "Liability (Credit Card)"
AssetMap Field	PreciseFP Field	Required Comments
Type	Liability (Credit Card)	Yes
Reference Name	Liabilities/Credit Cards/Name	Yes
Location	Credit Card from PreciseFP	Yes
Value	Liabilities/Credit Cards/Current Balance	Yes
Owner	Liabilities/Credit Cards/Owner	Yes

AssetMap Section	PreciseFP Section	Comments
Mortgages	Mortgages	Integrates records where Type is "Liability (Mortgage)"
AssetMap Field	PreciseFP Field	Required Comments
Type	Liability (Mortgage)	Yes
Reference Name	Liabilities/Mortgages/Name	Yes
Location	Liabilities/Mortgages/Type	Yes
Value	Liabilities/Mortgages/Current Balance	Yes
Owner	Liabilities/Mortgages/Interest Rate	Yes

AssetMap Section	PreciseFP Section	Comments
Loans	Loans	Integrates records where Type is "Liability (Loan)", "Liability (Credit Line)" or "Liability (School Loan)"
AssetMap Field	PreciseFP Field	Required Comments
Type	See Comments	Yes
Reference Name	Liabilities/Loans/Name	Yes
Location	Liabilities/Loans/Type	Yes
Value	Liabilities/Loans/Current Balance	Yes
Owner	Liabilities/Loans/Owner	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Employment & Income	Exports records where Type is "Income (W2)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Employment & Income/Employment/Title / Job Position	Yes
Value	Employment & Income/Annual Income/Employment Income	Yes
Type	Income (W2)	Yes
Location	Employment & Income/Employment/Employer	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Self-employment Income	Exports records where Type is "Income (1099)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Self-employment	Yes
Value	Employment & Income/Annual Income/Self-employment Income	Yes
Type	Income (1099)	Yes
Location	Self-employment	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Pensions & Annuities	Exports records where Type is "Income (Other Unearned)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Pensions & Annuities	Yes
Value	Employment & Income/Annual Income/Pensions & Annuities Income	Yes
Type	Income (Other Unearned)	Yes
Location	Pensions & Annuities	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Social Security	Exports records where Type is "Income (Social Security)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Social Security	Yes
Value	Employment & Income/Annual Income/Social Security Income	Yes
Type	Income (Social Security)	Yes
Location	Social Security	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Cash Dividends	Exports records where Type is "Income (Other Unearned)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Cash Dividends	Yes

Value	Employment & Income/Annual Income/Cash Dividends	Yes
Type	<i>Income (Other Unearned)</i>	Yes
Location	<i>Cash Dividends</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Interest	Exports records where Type is "Income (Other Unearned)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Interest</i>	Yes
Value	Employment & Income/Annual Income/Interest	Yes
Type	<i>Income (Other Unearned)</i>	Yes
Location	<i>Interest</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Other Income	Exports records where Type is "Income (Other Unearned)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Other Income</i>	Yes
Value	Employment & Income/Annual Income/Interest	Yes
Type	<i>Income (Other Unearned)</i>	Yes
Location	<i>Other Income</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Rent)	Exports records where Type is "Expense (Living Expenses)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Rent</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Rent	Yes
Type	<i>Expense (Living Expenses)</i>	Yes
Location	<i>Rent</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Alimony)	Exports records where Type is "Expense (Other)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Alimony</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Alimony	Yes
Type	<i>Expense (Other)</i>	Yes
Location	<i>Alimony</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Child Support)	Exports records where Type is "Expense (Other)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Child Support</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Child Support	Yes
Type	<i>Expense (Other)</i>	Yes
Location	<i>Child Support</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (College Expenses)	Exports records where Type is "Expense (Other)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>(College Expenses)</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/College Fund Contributions	Yes
Type	<i>Expense (Other)</i>	Yes
Location	<i>(College Expenses)</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Life Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Life Insurance</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Life Insurance	Yes
Type	<i>Expense (Premiums)</i>	Yes
Location	<i>Life Insurance</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Health Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	<i>Health Insurance</i>	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Health Insurance	Yes
Type	<i>Expense (Premiums)</i>	Yes
Location	<i>Health Insurance</i>	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Disability Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Disability Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Disability Insurance	Yes
Type	Expense (Premiums)	Yes
Location	Disability Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (LTC Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	LTC Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/LTC Insurance	Yes
Type	Expense (Premiums)	Yes
Location	LTC Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Homeowners Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Homeowners Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Homeowners Insurance	Yes
Type	Expense (Premiums)	Yes
Location	Homeowners Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Auto Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Auto Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Auto Insurance	Yes
Type	Expense (Premiums)	Yes
Location	Auto Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Umbrella Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Umbrella Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/Umbrella Insurance	Yes
Type	Expense (Premiums)	Yes
Location	Umbrella Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (E&O / Malpractice Insurance Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	E&O / Malpractice Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/E&O / Malpractice Insurance	Yes
Type	Expense (Premiums)	Yes
Location	E&O / Malpractice Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Other Insurance)	Exports records where Type is "Expense (Premiums)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Other Insurance	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/E&O / Other Insurance	Yes
Type	Expense (Premiums)	Yes
Location	Other Insurance	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (College Funds)	Exports records where Type is "Expense (Savings)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	College Funds Contributions	Yes
Value	Expenses & Taxes/Monthly Fixed Expenses/College Funds Contributions	Yes
Type	Expense (Savings)	Yes
Location	College Funds Contributions	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Annuities)	Exports records where Type is "Expense (Savings)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Annuity Contributions	Yes	
Value	Expenses & Taxes/Monthly Fixed Expenses/Annuity Contributions	Yes	
Type	Expense (Savings)	Yes	
Location	Annuity Contributions	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Retirement Plans)	Exports records where Type is "Expense (Savings)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Retirement Plans Contributions	Yes	
Value	Expenses & Taxes / Monthly Fixed Expenses / Retirement Plan Contributions	Yes	
Type	Expense (Savings)	Yes	
Location	Retirement Plans Contributions	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Other)	Exports records where Type is "Expense (Other)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Other Fixed	Yes	
Value	Expenses & Taxes/Monthly Fixed Expenses/Other Fixed Expenses	Yes	
Type	Expense (Other)	Yes	
Location	Other Fixed	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Credit Cards)	Exports records where Type is "Expense (Other)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Credit Card Payments	Yes	
Value	Expenses & Taxes/Monthly Fixed Expenses/Credit Card Payments	Yes	
Type	Expense (Other)	Yes	
Location	Credit Card Payments	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Mortgages)	Exports records where Type is "Expense (Other)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Mortgage Payments	Yes	
Value	Expenses & Taxes/Monthly Fixed Expenses/Mortgage Payments	Yes	
Type	Expense (Other)	Yes	
Location	Mortgage Payments	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Loans)	Exports records where Type is "Expense (Other)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Loan Payments	Yes	
Value	Expenses & Taxes/Monthly Fixed Expenses/Loan Payments	Yes	
Type	Expense (Other)	Yes	
Location	Loan Payments	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Expense (Living)	Exports records where Type is "Expense (Living Expenses)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Variable Living Expenses	Yes	
Value	Cash Flow & Net Worth/Monthly Cash Flow/Total Variable Expenses	Yes	
Type	Expense (Living Expenses)	Yes	
Location	Variable Living Expenses	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Taxes (Federal Income)	Exports records where Type is "Expense (Taxes)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	Federal Income Taxes	Yes	
Value	Expenses & Taxes/Annual Taxes/Federal Income Taxes	Yes	
Type	Expense (Taxes)	Yes	
Location	Federal Income Taxes	Yes	

AssetMap Section	PreciseFP Section	Comments
Cashflow	Taxes (State Income)	Exports records where Type is "Expense (Taxes)"

AssetMap Field	PreciseFP Field	Required	Comments
Reference Name	State Income Taxes	Yes	
Value	Expenses & Taxes/Annual Taxes/State Income Taxes	Yes	



Type	Expense (Taxes)	Yes
Location	State Income Taxes	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Taxes (FICA)	Exports records where Type is "Expense (Taxes)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	FICA	Yes
Value	Expenses & Taxes/Annual Taxes/FICA	Yes
Type	Expense (Taxes)	Yes
Location	FICA	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Taxes (Real Estate)	Exports records where Type is "Expense (Taxes)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Real Estate	Yes
Value	Expenses & Taxes/Annual Taxes/Real Estate Taxes	Yes
Type	Expense (Taxes)	Yes
Location	Real Estate	Yes

AssetMap Section	PreciseFP Section	Comments
Cashflow	Taxes (Other)	Exports records where Type is "Expense (Taxes)"
AssetMap Field	PreciseFP Field	Required Comments
Reference Name	Other Taxes	Yes
Value	Expenses & Taxes/Annual Taxes/Other Taxes	Yes
Type	Expense (Taxes)	Yes
Location	Other Taxes	Yes