

PRECISEFP / PRACTIFI MAPPING TABLE

Important Information
When searching for Practifi Naya Contacts, make sure that your contact is the "Primary Member" of the Household.

Practifi Section	PreciseFP Section	Comments	
Accounts	Household		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Primary Member	CLIENT	Yes	
Spouse	COCLIENT	Yes	
Type	Household	Yes	

Practifi Section	PreciseFP Section	Comments	
Contacts	Client/Co-client		<i>Integrates records where the Clients are the "Primary Member" and Co-clients are "Spouse"</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"</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	
Assets and Liabilities	Personal Property		<i>Integrates records where the Type is "Asset" and Category is "Own Home" or "Holiday Home"</i>
Practifi Field	PreciseFP Field	Required	Comments
Category	<i>See comments</i>	Yes	PreciseFP Property Type Practifi Naya Category
Record Type	Asset	Yes	Primary Residence Own home
Stage	Owned	Yes	Secondary Residence Holiday Home
Owner	ACCOUNT	Yes	
Description	Assets/Personal Property/Name		
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	Other Assets		<i>Integrates records where the Type is "Asset" and Category is "Other"</i>

Practifi Field	PreciseFP Field	Required	Comments
Category	Other	Yes	
Record Type	Asset	Yes	
Stage	Owned	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 "Liability" and Category is "Credit Card"

Practifi Field	PreciseFP Field	Required	Comments
Category	Credit Card	Yes	
Type	Liability	Yes	
Stage	Owned	Yes	
Owner	ACCOUNT	Yes	
Asset/Liability Name	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 "Liability" and Category is "Mortgage - Own home" or "Mortgage - Holiday home"

Practifi Field	PreciseFP Field	Required	Comments
Category	Mortgage - Own Home	Yes	PreciseFP Category Static Value Practifi Naya Category
Type	Liability	Yes	Mortgage - Own Home Mortgage - Own home
Stage	Owned	Yes	Mortgage - Holiday home
Owner	ACCOUNT	Yes	
Asset/Liability Name	Liabilities/Mortgages/Name		
Description	Liabilities/Mortgages/Type		
Notes	Liabilities/Mortgages/Owner		
Interest Rate	Liabilities/Mortgages/Interest Rate		
Initial Value	Liabilities/Mortgages/Original Balance		
Current Value	Liabilities/Mortgages/Current Balance		

Practifi Section	PreciseFP Section	Comments
Assets and Liabilities	Loans	Integrates records where the Type is "Liability" and Category is "Vehicle loan", "Other", "Line of credit", "Personal loan" or "Education loan"

Practifi Field	PreciseFP Field	Required	Comments
Category	See comments	Yes	PreciseFP Loan Type Practifi Portfolio Holding Category
Type	Liability	Yes	Auto Vehicle loan
Stage	Owned	Yes	Business Other
Owner	ACCOUNT	Yes	Credit Line Line of credit
Asset/Liability Name	Liabilities/Loans/Name	Yes	Personal Note Personal loan
Notes	Liabilities/Loans/Owner		School Loan Education loan
Interest Rate	Liabilities/Loans/Interest Rate		
Initial Value	Liabilities/Loans/Original Balance		
Current Value	Liabilities/Loans/Current Balance		

Practifi Section	PreciseFP Section	Comments
Income & Expense	Employment & Income	Export only

Practifi Field	PreciseFP Field	Required	Comments
Name	Employment Income	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Salary & wages	Yes	
Initial Amount	Employment & Income/Annual Income/Employment Income	Yes	

Practifi Section	PreciseFP Section	Comments
Income & Expense	Self-employment	Export only

Practifi Field	PreciseFP Field	Required	Comments
Name	Self-employment Income	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	

Related Entity	ACCOUNT	Yes
Type	Salary & wages	Yes
Initial Amount	Employment & Income/Annual Income/Self-Employment Income	Yes

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Pensions and Annuities		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Pensions and Annuities	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Pension	Yes	
Initial Amount	Employment & Income/Annual Income/Pensions and Annuities Income	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Social Security		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Social Security	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Social Security	Yes	
Initial Amount	Employment & Income/Annual Income/Social Security Income	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Cash Dividends		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Cash Dividends	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Dividend/Managed Fund Distribution	Yes	
Initial Amount	Employment & Income/Annual Income/Cash Dividends	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Interest		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Interest	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Interest	Yes	
Initial Amount	Employment & Income/Annual Income/Interest	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Other Income		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Other Income	Yes	
Frequency	Yearly	Yes	
Record Type	Income	Yes	
Related Entity	ACCOUNT	Yes	
Type	Other taxable income	Yes	
Initial Amount	Employment & Income/Annual Income/Other Income	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Rent		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Rent	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Rent	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Rent	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Alimony		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments

Name	<i>Alimony</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Other expenses</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Alimony	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Child Support		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Child Support</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Other expenses</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Child Support	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	College Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>College Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>School fees</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/College Expenses	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Life Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Life Insurance Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Insurance - Life</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Life Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Health Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Health Insurance Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Insurance - Other</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Health Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Disability Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Disability Insurance Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Insurance - Other</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Disability Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Long Term Care Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Long Term Care Insurance Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Insurance - Other</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Long Term Care Insurance	Yes	

Practifi Section	PreciseFP Section		Comments
Income & Expense	Homeowner's Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Homeowner's Insurance Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	

Type	Insurance - Other	Yes
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Homeowner's Insurance	Yes

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Auto Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Auto Insurance Expenses	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Insurance - Other	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Auto Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Umbrella Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Umbrella Insurance Expenses	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Insurance - Other	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Umbrella Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	E&O / Malpractice Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	E&O / Malpractice Insurance Expenses	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Insurance - Other	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/E&O / Malpractice Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Other Insurance Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Other Insurance Expenses	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Insurance - Other	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Other Insurance	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	College Fund Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	College Fund Contributions	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Other expenses	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/College Fund Contributions	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Annuity Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Annuity Contributions	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Other expenses	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Annuity Contributions	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Retirement Plan Contributions		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	Retirement Plan Contributions	Yes	
Frequency	Monthly	Yes	
Record Type	Expense	Yes	
Type	Other expenses	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Retirement Plan Contributions	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Credit Card Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Credit Card Payments</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Credit Cards</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Credit Card Payments	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Mortgage Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Mortgage Payments</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Mortgage</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Mortgage Payments	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Loan Payments		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Loan Payments</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Other expenses</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Loan Payments	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Other Fixed Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Other Fixed Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Type	<i>Other expenses</i>	Yes	
Initial Amount	Expenses & Taxes/Monthly Fixed Expenses/Other Fixed Expenses	Yes	

Practifi Section	PreciseFP Section	Required	Comments
Income & Expense	Variable Expenses		<i>Export only</i>
Practifi Field	PreciseFP Field	Required	Comments
Name	<i>Variable Expenses</i>	Yes	
Frequency	<i>Monthly</i>	Yes	
Record Type	<i>Expense</i>	Yes	
Description	<i>Variable Expenses</i>	Yes	
Type	<i>Other expenses</i>	Yes	
Initial Amount	Cash Flow & Net Worth/Monthly Cash Flow/Total Variable Expenses	Yes	