

WHAT'S NEW IN...

Profiles Forecaster (Phase 2 Update)

Release Date: May 13, 2013

This release of Profiles Premium features new text reports that are tailored for your client. Easy to integrate into each financial plan, the reports give detailed explanations on a wide range of topics.

WHAT'S NEW/FEATURES IN PROFILES™?

Client Reports

A series of 22 new tdx reports have been added to Profiles™. These reports cover a comprehensive array of topics and include content tailored to your clients without distancing jargon or over-complicated concepts. For a complete list of these reports see: Profiles™ Premium Reporting Updates.

UPDATES TO PROFILES™

Calculations and Data

ASSET ALLOCATION

Underlying Ibbotson asset allocation data has been updated. This includes updates to:

- Capital Market assumptions, including: return rates & standard deviation, correlation coefficients, and efficient frontier data points.
- Model Portfolio allocations.

MONTE CARLO

Simulation data for Monte Carlo reports has been updated to reflect the most recent capital market assumptions.

Password Reset Timeline

The expiration date for a password has been increased to 60 days from 30 days.

Printable Forms

The printable forms in Profiles Professional™ have been updated to reflect the changes to asset allocation and the risk tolerance questionnaire.

Supported Platforms for Profiles Professional™

- Microsoft Windows XP (Service Pack 3), Windows Vista, and Windows 7.
- Microsoft .NET Framework v4.
- 2 GB of RAM or higher.
- Recommended Browsers: Microsoft Internet Explorer 9, Google Chrome v20+.
- Supported Browsers: Microsoft Internet Explorer 8, Firefox v13, Apple Safari v5, Opera v12.
- Adobe Reader 7.0 or higher.
- 512MB of free hard disk space or higher.
- Resolution of 1024 x 768 or higher.

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Reports

Additionally, several reports have been updated with the latest data available. This data includes: Morningstar concept reports, Dow Jones Averages, History of Inflation, Tax Freedom Day, and others.

Sample Cases

The sample cases included with Profiles Professional™ contain asset allocation data so that you can experiment with new asset allocation features without making modifications to your clients' case files.

Contact Information and Additional Support

For additional support contact partner services:

Phone: 888.692.3474

Email: support@advicentsolutions.com