

# An overview of the NaviPlan<sup>®</sup> client portal

## Functions addressed in this document:

- A step by step walk through of the NaviPlan client portal.
- How a client can review their net worth, cash flow, and goals using plan data.

The client portal offers your clients a digital way to review their plan success in a centralized location.

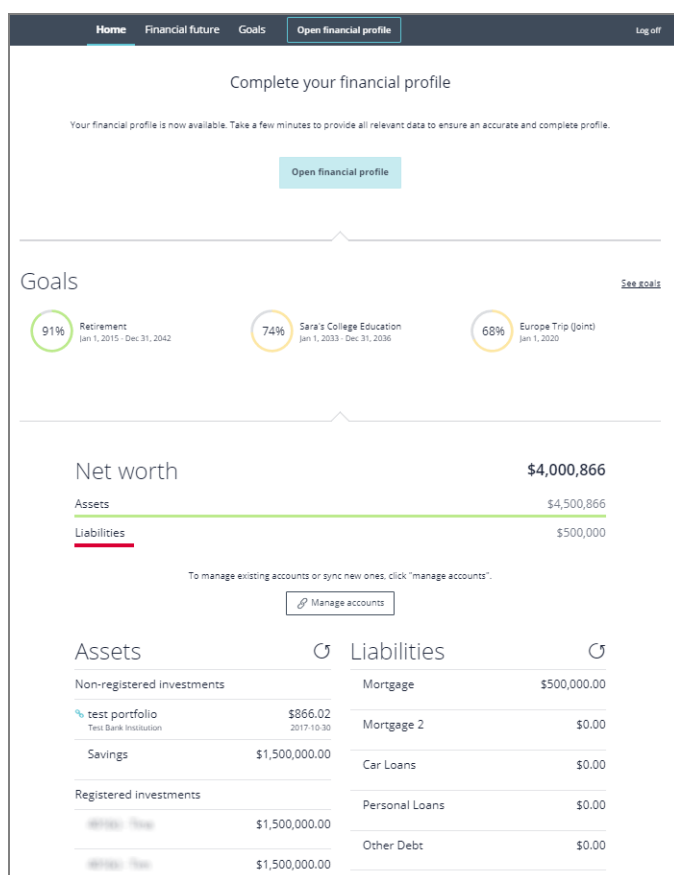
As the client portal is digital, clients may have questions about the information presented. This document will provide you with a clear understanding of every section of the client portal.

**NOTE :** In order for the client portal to generate the financial summary, a plan from NaviPlan must be completed, approved and submitted. To learn more about this process, click [here](#).

**NOTE :** To add the client portal to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

## Welcome page

When a client logs on to the client portal they will be presented with the "welcome" page.



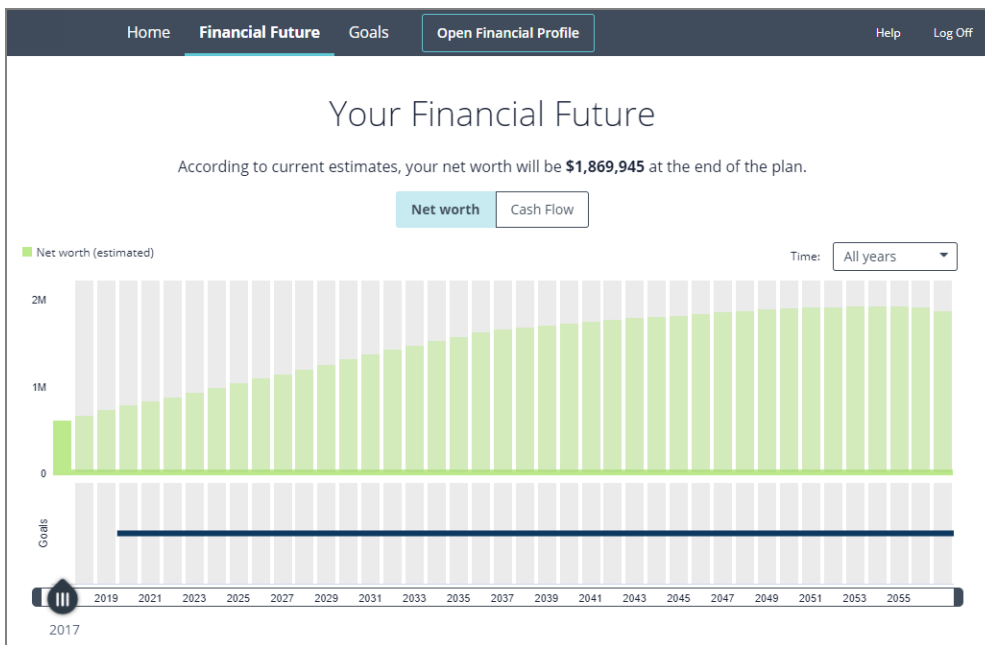
NaviPlan client portal - "welcome" page

Welcome presents clients with a high level presentation of their current year "net worth" as well as their various goals. Clicking "see goals" for goals, or "see all" for "net worth" will guide clients to additional pages that provide greater insight on the breakdown of these values.

Navigation for the client is primarily controlled through the navigation bar. Each available option will guide the client to a primary section of the client portal. Clicking "financial future" will provide clients with details related to their cash flows and net worth on an annual basis. "goals" will provide greater information on the various goals, listing potential issues and steps that can be taken to fix them.

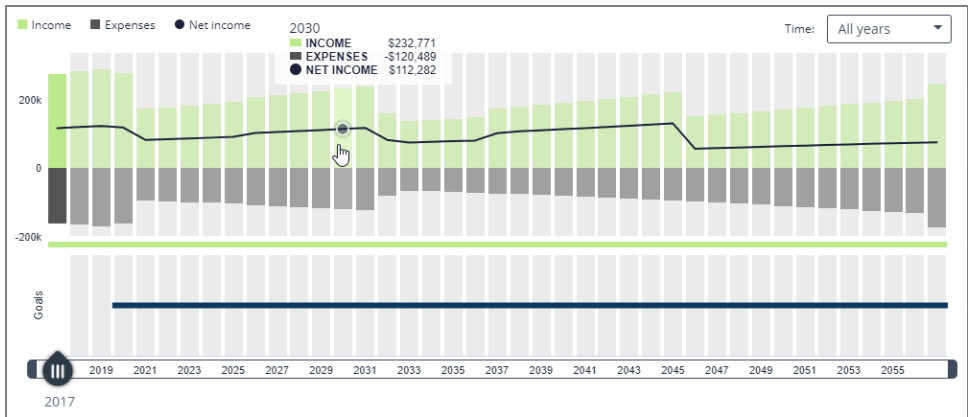
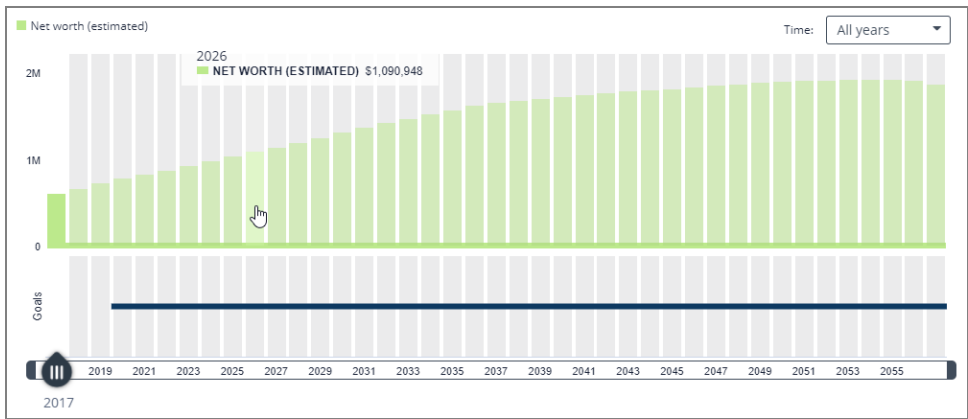
## "Financial Future"

"Financial Future" provides clients with annual timelines and detailed lists of their net worth and cash flow.

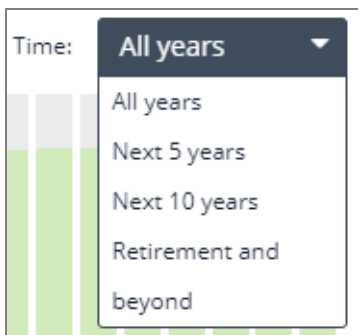


Client portal - "Your Financial Future" page

Clients may use the timeline to view how the net worth or cash flow changes over the life of the plan. Hovering over any specific year on the net worth or cash flow timelines will provide clients with details on their estimated net worth or the total income, expenses, and surplus/deficit. To switch between timelines, clients can click the "net worth" or "cash flow" buttons on the top of the page.

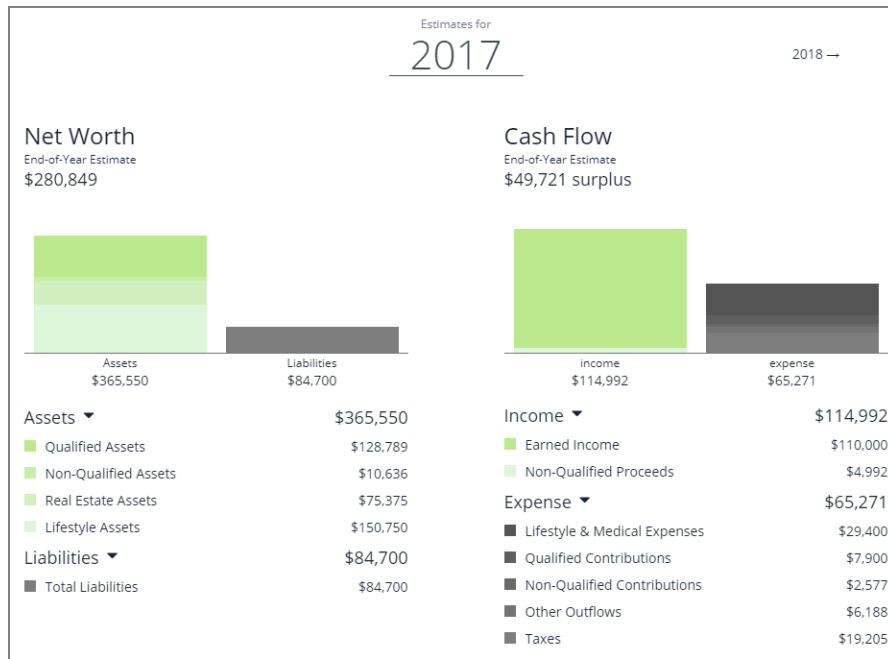


Client portal - "Your Financial Future" page - "Net Worth/Cash Flow" timelines



In the top right of the timeline, clients can adjust the time frame of the timeline. All changes will immediately take effect, and will carry over to the other timeline if you switch over.

Below the timeline, the annual net worth and cash flow are broken down and categorized by account, liability, income, and expense type.



Client portal - "Your Financial Future" page - "Details" section

Clients can adjust which year to analyze by clicking the next year in the top right of the section, or by moving the slider, found below the timeline, to the desired year. To reduce information that is presented, each item type can be collapsed by clicking the ▼ button found to the right of each item.

## Goals

All goals will be available for clients to review. Click each goal on the top of the page to view details.



Client portal - "Goals" page

Each goal detail section will provide clients with information about when the goal will occur, the goal's percent of coverage, available assets for goals, and the "explore your options" feature.

"Explore your options" allows for clients to adjust multiple values within a goal to adjust goal success. Similar to "what are my options" within NaviPlan, clients can adjust saving strategies, goal dates, goal expense values, and other goal specific values.

Changes are dynamic and will be automatically applied to the goals page. If clients wish to return the "explore your options" section to default values, they can press the "reset options" button.