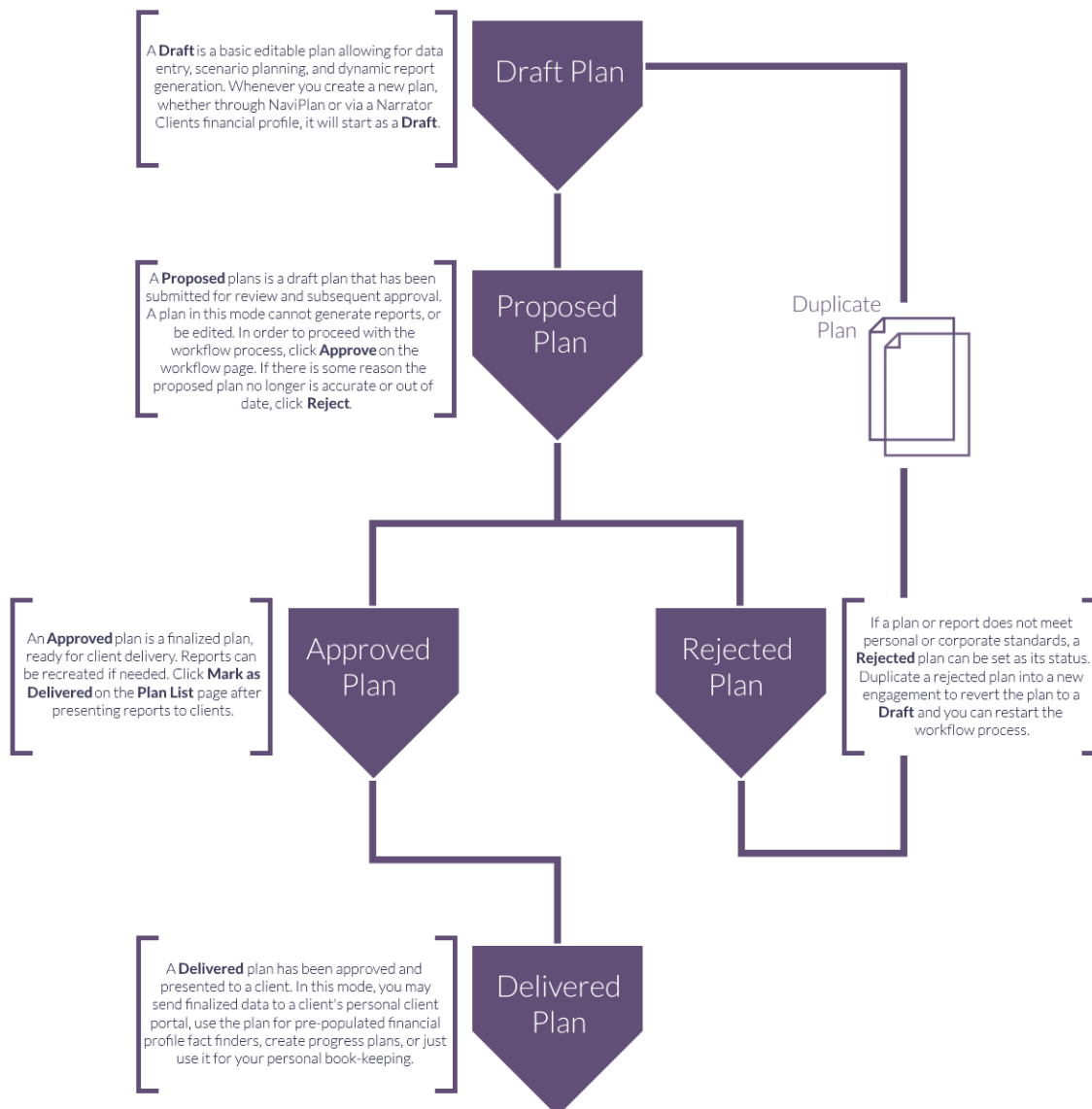


Enhancing NaviPlan with Workflows

NaviPlan® is the flexible tool that allows a financial professional the tools needed to serve whoever walks into their office. Embedded within this flexibility is the powerful workflow system that unlocks additional valuable features such as Progress Reporting, the ability to publish completed plans to NaviPlan's client portal (Narrator® Clients), and the ability to send out Financial Profile Fact Finders.

Explore with a guided path through NaviPlan's workflow, and details each step of the workflow process.

The Stages of a Workflow Enabled Plan



NOTE : To learn more about workflow processes, click [here](#).