

## Presentation Module

Whether it's your first time meeting with a client or further along in your relationship, the **Presentation Module** can help you engage your clients in a financial conversation that makes finding the ideal planning solution easier for you.

The **Presentation Module** offers all of NaviPlan's detailed calculations and features in a client-friendly format with images and statistics to put the plan in context. All financial data entered in the **Presentation Module** carries through to the normal NaviPlan display mode.

From the **Quick Actions** menu, click **Switch to Presentation View** to enter the **Presentation Module**.

## Working with new clients

To create a new client file in the **Presentation Module**, follow these steps:

1. From the **Presentation Module**'s landing page, click the **Create client** link in the upper left corner.
2. Enter the client's demographic information. Once finished, click **Next**.
3. Select the **Analysis Type**.
4. After the client file is created, select a presentation from the available list.

## Working with existing clients

To access an existing client file in the **Presentation Module**, follow these steps:

1. From the **Presentation Module**'s landing page, click the **Select client** link in the upper left corner.
2. Select the appropriate client file and engagement.
3. After the client file is selected, select a presentation from the available list.

## Entering financial data using presentations

NaviPlan includes various presentations depending on Planning levels.

Forecaster Exclusive:

- **Retirement Assessment:** A quick assessment of a retirement plan that can be done interactively during a client meeting.
- **Education Assessment:** A quick assessment of an education plan that can be done interactively during a client meeting.
- **Major Purchase Assessment:** A quick assessment of a major purchase plan that can be done interactively during a client meeting.

Level 2 Exclusive:

- **Planning to Protect:** Provides an income coverage insurance analysis, including needs up to the survivor's death and education expenses. Gives clients a clear idea of whether their current insurance coverage is adequate or how much more they may require.
- **The Road to Retirement:** Offers valuable retirement information while assisting in gathering relevant data to establish how close clients are to achieving their retirement goals. Helps clarify what actions clients need to take to enjoy a successful retirement.
- **Planning for your Family's Education:** Quickly and easily defines education goals and determines if their current strategy will cover those future expenses. Identifies which goals are underfunded and how much additional funding may be required.
- **Cash Flow Planning:** Acts as a great starting point for any client meeting. Identifies whether clients have cash surplus available for savings and any deficits to address.

- **Income Planning for Retirees:** Considers retirees' current and future lifestyles, while assessing current cash flow and how long retirement income needs to last. Calculates a projected withdrawal rate from savings; displays incomes and expenses throughout retirement.

Available in Forecaster, Level 1 and Level 2:

- **Life Insurance Quick Assessment:** Quickly determines your clients' need for additional life insurance, considering both ongoing and immediate lump sum needs versus assets available to meet those needs.

NaviPlan also includes an additional presentation available exclusively within Progress Plans:

- **Tracking Your Progress:** Provides the opportunity for you and your client(s) to evaluate progress towards meeting their financial goals. This includes reviewing and updating their net worth and cash flow information and comparing it to their last delivered plan. As you go through the presentation, you will be able to review progress on investments and goals.

## Navigating through a presentation

- Click **Back** and **Next** to navigate one slide at a time.
- To quickly move to a non-sequential slide within the presentation, click **Table of Contents**. Select your desired slide from this menu.
- Click **Finish** to close the presentation and return to the landing page.

### Printing a presentation

To print all slides for the presentation that is open, from the **Quick Actions** menu, click **Print Presentation**.

To print a streamlined report, click the **Print Report** button that appears at the end of each presentation.

### Switching to NaviPlan view

To return to the NaviPlan® planning view, click **Switch to NaviPlan** from the **Quick Actions** menu.

### Using presentations on tablets

NaviPlan presentations are fully compatible with tablets, such as the Apple iPad. The application uses standard navigation gestures:

- Swipe vertically with two fingers to scroll within screen items, dialog boxes and menus. A scroll bar will appear if the item is scrollable.
- Swipe horizontally with two fingers to navigate between slides in a presentation.

**Tip:** To add a NaviPlan icon to your Apple iPad home screen: open the NaviPlan login screen, select the **Action** button, then select **Add to Home Screen**.