

Narrator® Clients v2.2

Release Date: July 28, 2017

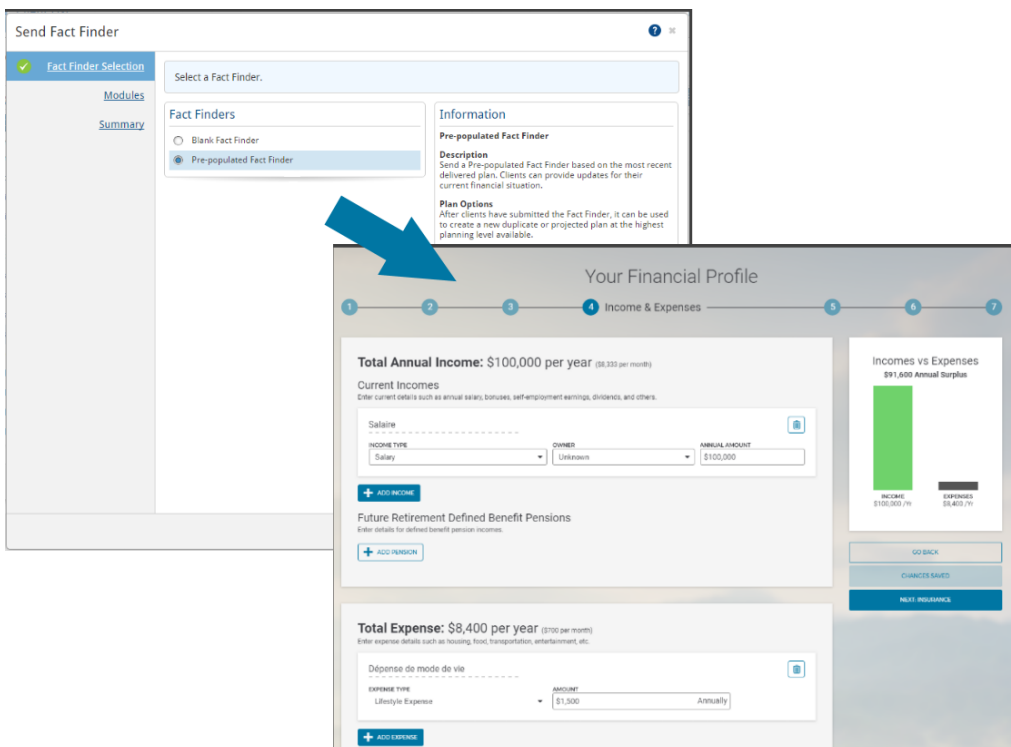
NaviPlan's interactive client portal, Narrator® Clients, is enhanced. Annual reviews are now more efficient with pre-populated Financial Profile functionality.

- Pre-populated Financial Profile Fact Finders

Here are the Details ...

Pre-populated Financial Profile Fact Finders

Improve efficiency and save time during financial planning reviews with the pre-populated fact finder, now available for Narrator® Clients. Give clients the opportunity to review and revise their financial profile prefilled with data from their previous plan, and take advantage of seamless review and creation of annual base plans instantly. Advisors can send pre-populated fact finders from the **Send Fact Finder...** button within the **Narrator Clients User Setup** menu.



Narrator Clients User Setup - Narrator Clients User Account Overview - Send Fact Finder Pop-Up

NOTE : Pre-populated financial profiles details require a completed delivered plan. To learn more about this process click [here](#).

Supported Platforms for Narrator® Clients v2.2

Display:

- 320 x 480 or higher

Browsers:

- Microsoft® Internet Explorer® 11.0
- Microsoft® Edge
- Google® Chrome
- Mozilla Firefox®
- Apple® Safari