

Narrator[®] Clients 2.5 release

Advicent has updated Narrator Clients, the interactive client portal powered by NaviPlan[®], to include a new "explore your options" feature and detailed account lists.

- [“Explore your options” in Narrator Clients](#)
- [Enhanced net worth listings](#)

NOTE: To add Narrator Clients to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

Details

“Explore your options” in Narrator Clients



Narrator Clients - "goals" page

"Explore your options" is a new feature that empowers clients to analyze different tactics and develop a strategy for accomplishing their financial goals.

When a plan has been published to the Narrator Clients portal, clients can navigate to the "goals" page of the portal and adjust variables such as goal date, lump sum savings, monthly savings, and goal expenses to see how simple but strategic strategy changes can impact their financial success.

NOTE: In order to properly synchronize with this new feature, existing published plans must be unpublished and published back to the portal. This does not need to be done for newly published plans.

Enhanced net worth listings

Narrator Clients now includes an itemized list of all qualified and non-qualified accounts, assets, and liabilities.

The net worth listing gives clients a better understanding and insight of what is contributing to their net worth and can be a quick resource for review or comparison.

Net worth		\$511,386	
<small>Data displayed is from your plan</small>			
Assets		\$712,686	
Liabilities		\$201,300	
Assets		Liabilities	
Non-registered investments			
Checking/Savings	\$11,323.00	Mortgage	\$120,000.00
Registered investments			
Linda's	\$92,413.00	Lake House Mortgage	\$60,000.00
Mike's	\$85,965.00	Car Loan	\$15,000.00
Joey's College Fund	\$26,985.00	Credit Card	\$6,300.00
Additional assets			
Home	\$263,000.00		
Lake House	\$210,000.00		
RV	\$23,000.00		

Narrator Clients - "home" page

Supported platforms for Narrator® Clients v2.5

Display (computer and mobile):

- 320 x 480 or higher

Browsers:

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