

# NaviPlan Premium v17.0.4 Canada

Release Date: April 7, 2017

NaviPlan has been expanded to now offer the financial profile fact finder via Narrator® Clients powered by NaviPlan®, granting a completely digital data collection experience.

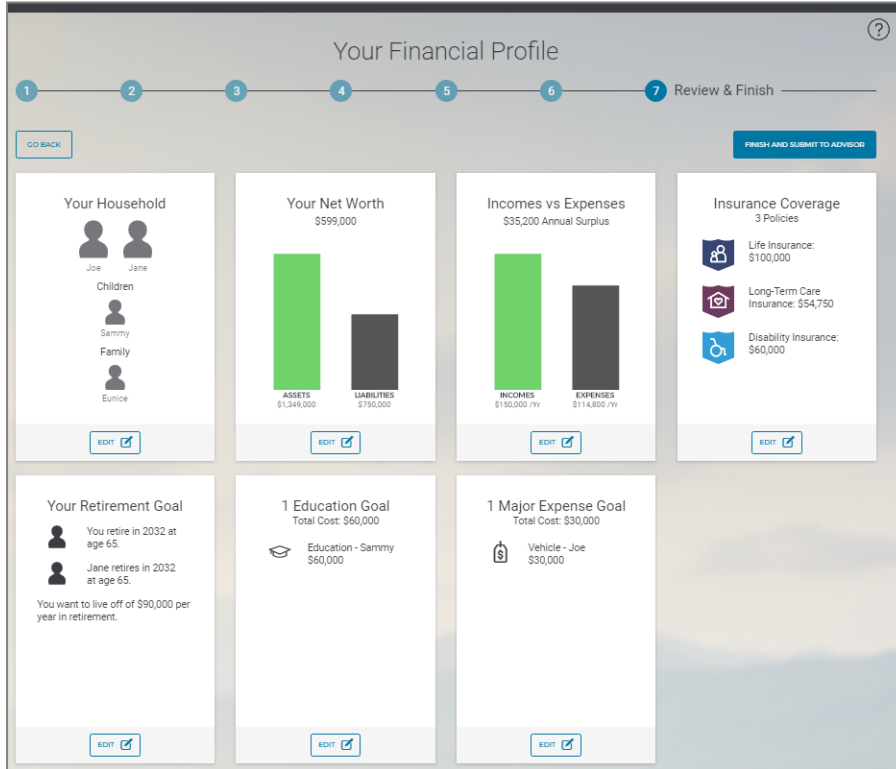
- [Financial Profile Fact Finders](#)
- [Advisor Alerts](#)

## Here are the Details ...

**NOTE :** This feature is only available with Narrator® Clients. If unavailable, contact [Advicent](#) at (855) 885-7526 for more information.

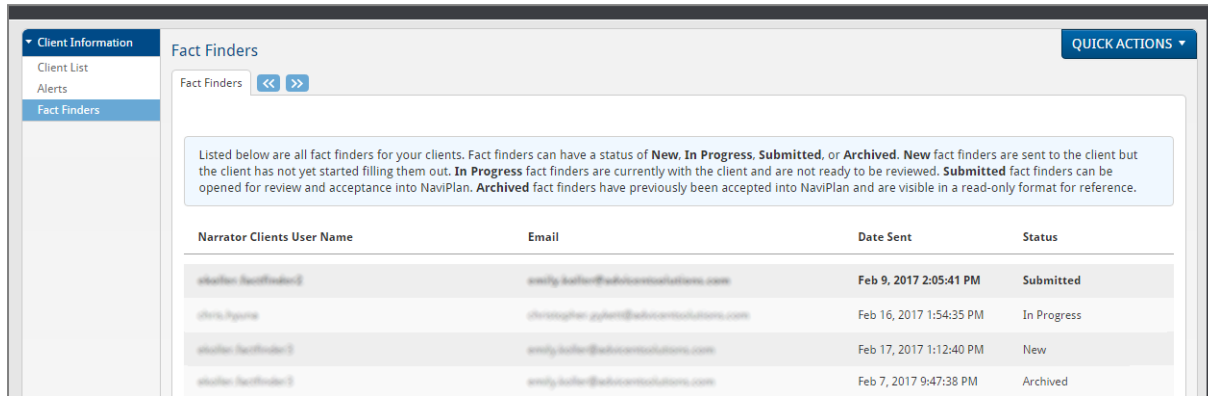
## Financial Profile Fact Finders

Save time by reducing repetitive annual data collection and data entry, and provide clients with a simple and interactive data-capturing experience with the Narrator® Clients financial profile fact finder.



Narrator® Clients - Financial Profile Fact Finder

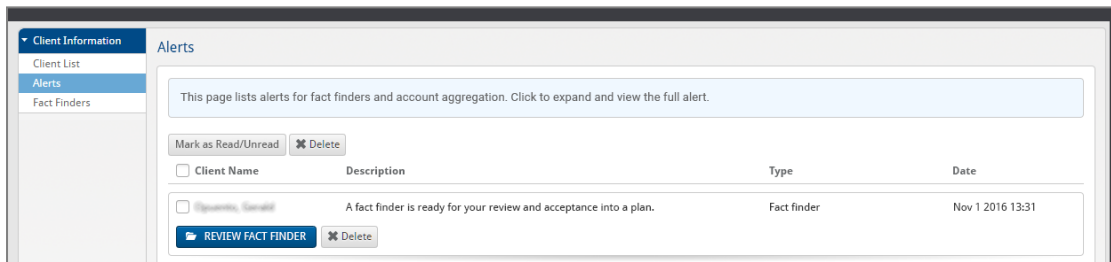
Clients can enter and submit their financial data to NaviPlan giving you the ability to manage their financial profiles, review their data, and transfer it to a new client plan.



Client Information - Fact Finders list

## Alerts

Stay up to date with your client's financial profiles with **Alerts**. **Alerts** is available under **Client Information** in NaviPlan.



Client Information - Alerts

## Supported Platforms for NaviPlan v17.0.1

### Applications:

- Microsoft® Word: version 2013, 2016
- Adobe Reader: version 11.0+
- Adobe Flash Player: version 20.0+

### Display:

- 1280 x 720 or higher

### Browsers:

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