ADVICENT

NaviPlan®

NaviPlan® 18.1 release

May 2018

NaviPlan has been updated with enhancements to client reports, the client portal, and the Presentation Module.

- New and improved client reports
- Client portal enhancements
- Other improvements

Details

New and improved client reports

New client report – "First Year Detailed Income Tax"

The "First Year Detailed Income Tax" report gives clients a detailed look at how taxes are calculated during the first year of their plan. This report can be a jumping-off point to justify an investment strategy change aimed at reducing a client's overall tax burden.

First Year Detailed Income Tax

Current Plan - John

This report provides detailed income tax information for the first year of the plan 2018 for John.
Marital Status: Single

Regular Tax Calculation		
Calculation of Total Income		
Employment	$50,000	
Investment		
Dividends	$92	
Capital Gains	$14	
Dividends	$280	
Capital Gains	$44	
Total Income		$50,430
Deductions from Total Income		
RRSP Contributions	$2,500	
Total		$2,500
Net Income		$47,930
Deductions from Net Income		
Total		$0
Taxable Income		$47,930
Regular Federal Tax Calculations		
Federal Tax on Taxable Income		$7,262
Tax Credits (Non-Refundable)		
Personal Credit	$1,771	
Canada Employment Credit	$179	
CPP/QPP (employment)	$345	
Employment Insurance	$125	
Dividend Credit	$56	
Total		$2,476
Regular Federal Tax (A)		$4,786
Alternative Minimum Tax		
Adjusted Taxable Income and Minimum Amount		
Taxable Income	$47,930	
Add		
Excluded Income Portions	$35	

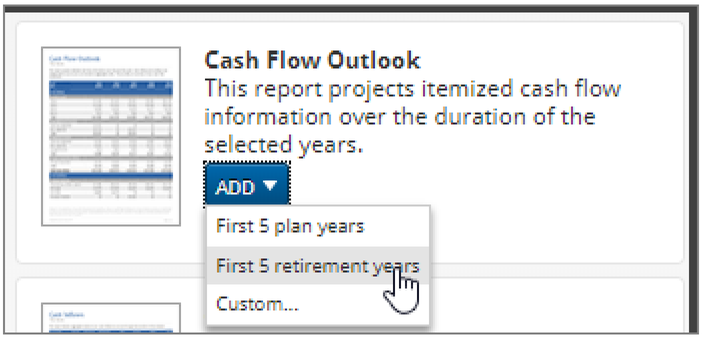
"First Year Detailed Income Tax" report

Updated client report - "Cash Flow Outlook"

The "Cash Flow Outlook" report is now scalable and allows multiple years to be selected for analysis. You can choose five specific years—not limited sequentially—to analyze.

This enhancement provides the client more clarity about changes to their cash flow during their plan and can reveal potential points of concern.

Click the "Add" button, found under the report on the "Client Report" page, to select which years you wish to include.



Client Reports - Cash Flow

Client portal enhancements

NOTE: To add the client portal to your current NaviPlan experience, contact Advicent at (855) 885-7526.

Terminology change

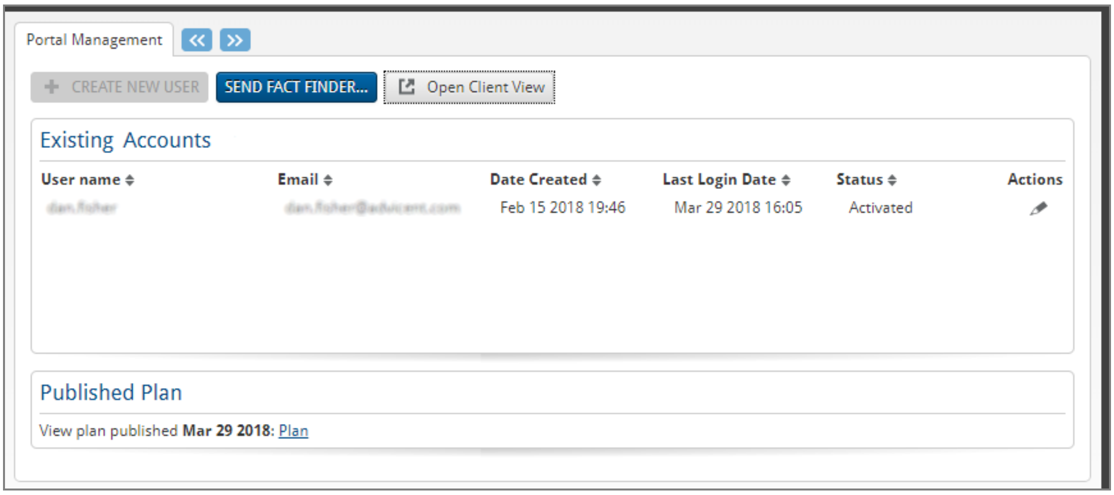
As part of our ongoing commitment to providing a single, scalable planning solution for all of our users, the Narrator Clients portal has been renamed the NaviPlan client portal.

This change simplifies the naming of features within NaviPlan and clarifies any technology-focused discussions that you may have with your clients.

User interface enhancements

Client portal navigation is now exclusively found on the left hand side of the screen within the "Active Client" drop-down menu of NaviPlan. Functionality within the "Portal Management" page remains the same.

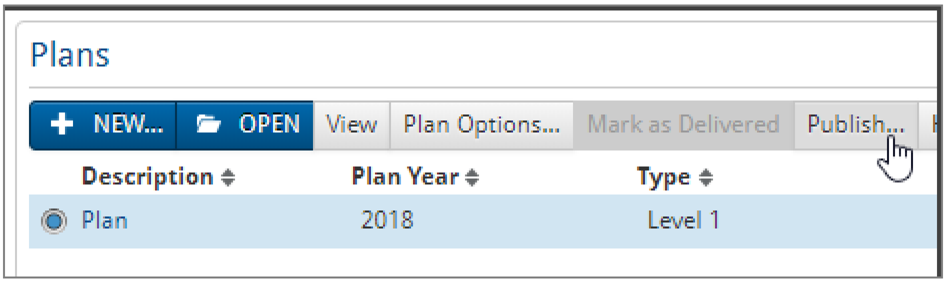
Focusing client portal management on a specific client saves you time while assisting clients with their client portal—whether in-person during a client meeting or via other means of communication.



Active Client - Portal Management

Level 1 portal publishing

Level 1 client plans can now be published to the client portal. This expansion gives you greater freedom around what type of plans you can create and grants clients who have simpler planning scenarios the option to experience the client portal.



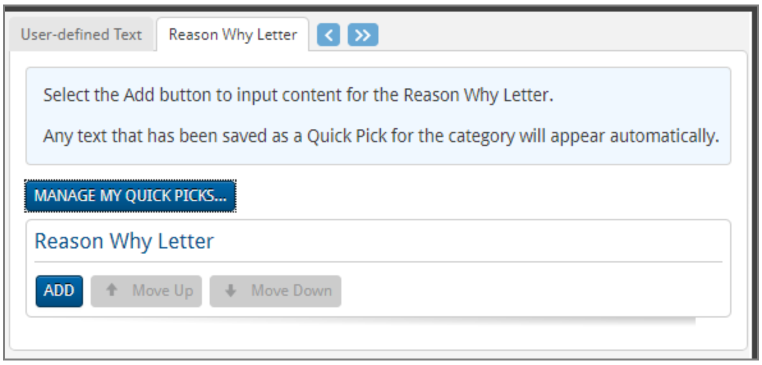
Active Client - Plans list

Other improvements

"Reason Why Letter"

Within the "User Defined Text" and "Content Settings" pages, it is now possible to add "Reason Why Letter" text that can be included in a client report.

This text allows you to provide your client with a document regarding the rationale for their product purchase and to confirm that the sale is suitable to the client's needs.



Results - User Defined Text - Reasons Why Letter

Terminology change - alimony

Alimony is now referred to as spousal support within the application. This change modernizes in-app text to match current professional terminology.

Pension detail enhancements

To reduce potential confusion, payment frequency indicators have been added to the right of the value boxes within the "Defined Benefit Pension Details" pop-up within the "Enter Financial Data - Cash Flow" page.

Supported platforms for NaviPlan® v18.1

Applications:

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

Display:

- 1280 x 720 or higher

Browsers:

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