

NaviPlan® 18.3 release

November 2018

NaviPlan has been updated to include the client report editor, client portal improvements, and expanded private corporation options.

[Client report editor](#)

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[Enhanced private corporation functionality](#)

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Details

Client report editor



NOTE: To add the client report editor to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

New presentation-ready client reports can now be created, previewed, and deployed within the Client Report Console. Administrative users can name, describe, and categorize reports; insert text and visuals with several layout options; assign plan level and advisor access; and more. Visual elements from the net worth and retirement reports – such as charts and graphs – are available for inclusion in new report creation.

Pre-existing net worth and retirement reports can also be edited. Text for these reports can be modified to fit your firm's unique needs. Any modification to these reports can be reverted back to their default text at anytime.

Deployment | Report Pages | Templates | Client Reports | Report Page Editor | Template Editor

Report Page Editor | Select a Report | Build Report

Retirement | Custom Content | SETTINGS

Select a Section: Slot 2

Retirement Success

Using Monte Carlo, the below graphs will indicate how successful retirement will be.

Plan	Success Rate	90th Percentile	50th Percentile	10th Percentile
Current Plan	80%	\$4,530,421	\$0	\$0
Proposed Plan	97%	\$2,840,830	\$119,879	\$0

Edit Section | Content Type: [Text] [Table] [Chart]

- Assets at Retirement Summary [ADD]
- Probability of Success - Retirement Summary [Remove]

Plan	Success Rate	90th Percentile	50th Percentile	10th Percentile
Current Plan	80%	\$4,530,421	\$0	\$0
Proposed Plan	97%	\$2,840,830	\$119,879	\$0

Table displaying success rate and details of the Monte Carlo simulation against retirement for both the current and proposed plans.
Columns include: Plan, Success Rate, 90th Percentile, 50th Percentile, and 10th Percentile.
- Retirement Goal Coverage Comparison Summary [ADD]
- What Are My Retirement Goal Options Summary [ADD]

Client portal improvements



NOTE: To add the client portal to your current NaviPlan experience, contact [Advicent](https://www.advicent.ca) at (855) 885-7526.

Account holding entry support

Account holdings can now be included in account entry within a client's financial profile. Details such as a description, ticker symbol, and market value can be included. This change grants clients the ability to provide a greater amount of account detail and minimize additional advisor side data entry.

Accounts

Chequing/savings accounts, RRSPs, RRIFs, and others.

Description: RRSP [Remove]

Account type: RRSP | Owner: John | Market value: \$15,000 | Holdings: (1)

Holdings

Individual investments in an account

Description	Ticker Symbol	Market value
Canadian National Railway	CNI	\$15,000


[+ Add] [Close]

Disability insurance benefit entry improvement

Disability insurance benefit can now be entered as either a percentage of salary or as a dollar amount. This expands entry options for clients and can be a simpler, more accurate way to enter insurance policy information.



Disability insurance

Description 

Disability Needs

Policy type	Insured	Benefit
Group long-term disability ▼	Zeke ▼	75.00%
\$ or % of Salary		
Frequency	Premium	Frequency
Monthly ▼	\$500	Monthly ▼

+ Add policy

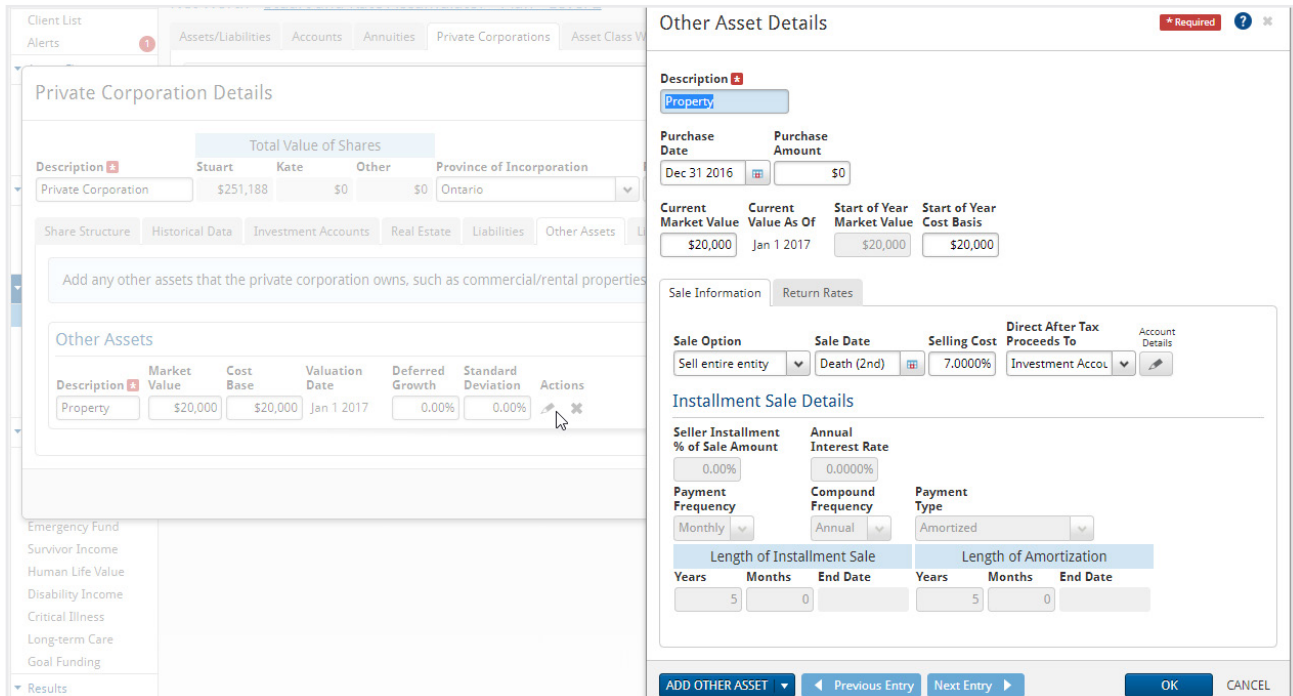
Financial profile workflow enhancements

Any approved or delivered client plan can now be used as the basis for a client's financial profile (previously limited to the most recent financial profile).

Enhanced private corporation functionality

Assets entered in the Other Assets section of a private corporation can now be sold. Identical to the corporation real estate asset sale strategies, these assets can be sold by going into the details and modelling all the necessary information. The sale date defaults to last plan member death, and in certain cases will be automatically sold when the corporation is wound up.

Taxes on the sale will be automatically calculated and will be reflected within the client and quick action reports.



The screenshot displays the 'Private Corporation Details' and 'Other Asset Details' sections of the Advicent software. The 'Private Corporation Details' section includes a table for 'Total Value of Shares' and a list of 'Other Assets'. The 'Other Asset Details' section provides a comprehensive form for entering asset information, including purchase date, current market value, and sale options.

Description	Stuart	Kate	Other	Province of Incorporation
Private Corporation	\$251,188	\$0	\$0	Ontario

Description	Market Value	Cost Base	Valuation Date	Deferred Growth	Standard Deviation	Actions
Property	\$20,000	\$20,000	Jan 1 2017	0.00%	0.00%	

Purchase Date	Purchase Amount
Dec 31 2016	\$0

Current Market Value	Current Value As Of	Start of Year Market Value	Start of Year Cost Basis
\$20,000	Jan 1 2017	\$20,000	\$20,000

Sale Option	Sale Date	Selling Cost	Direct After Tax Proceeds To
Sell entire entity	Death (2nd)	7.0000%	Investment Accou

Length of Installment Sale	Length of Amortization				
Years	Months	End Date	Years	Months	End Date
5	0		5	0	

Additional changes

Asset Classifier search change

Due to a change in the relationship between Morningstar and the providers of CUSIP data, searching by CUSIP number has been removed from NaviPlan in both Morningstar Standard and Expanded Asset Allocation models and asset classifier tools. Searching by all other Asset Classifiers and partners who provide custom Asset Classifier data will be unaffected.

Supported platforms for NaviPlan® v18.3

Browsers:

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

Applications:

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

Display:

- 1280 x 720 or higher