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NaviPlan® 18.3 release

November 2018

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

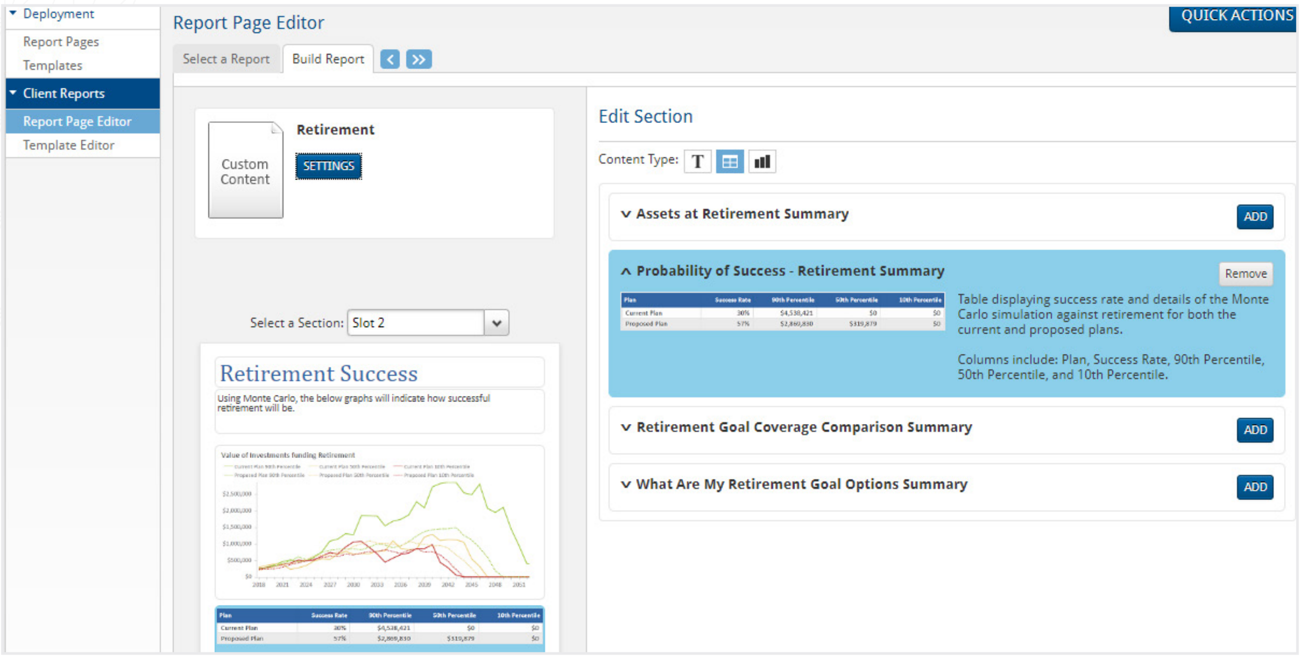
Details

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.

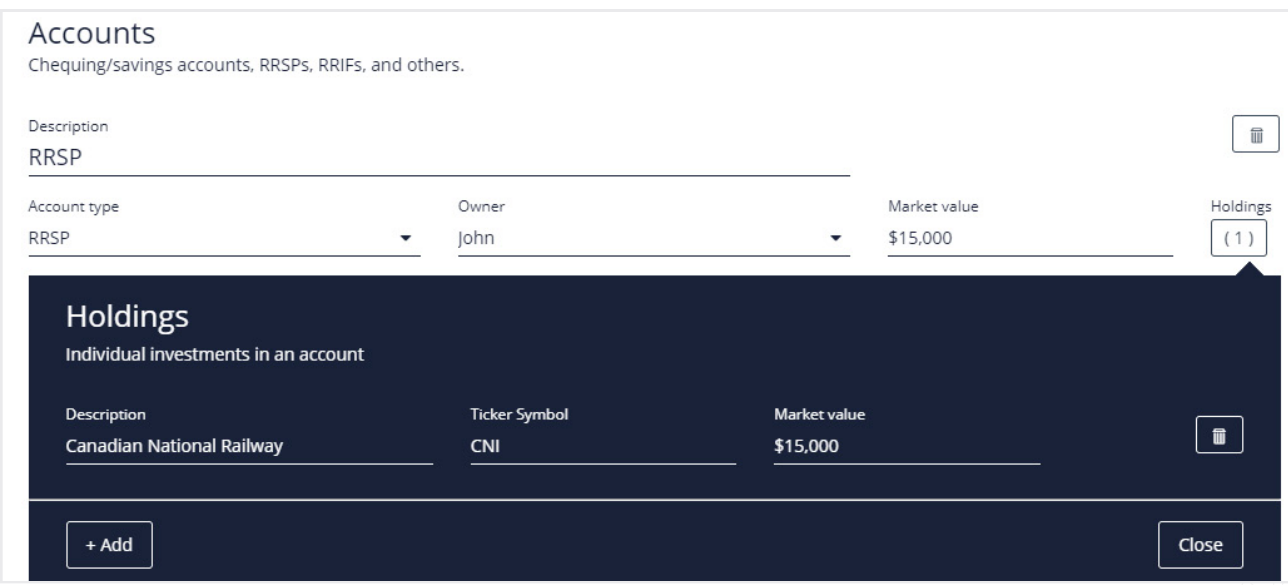


Client portal improvements

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

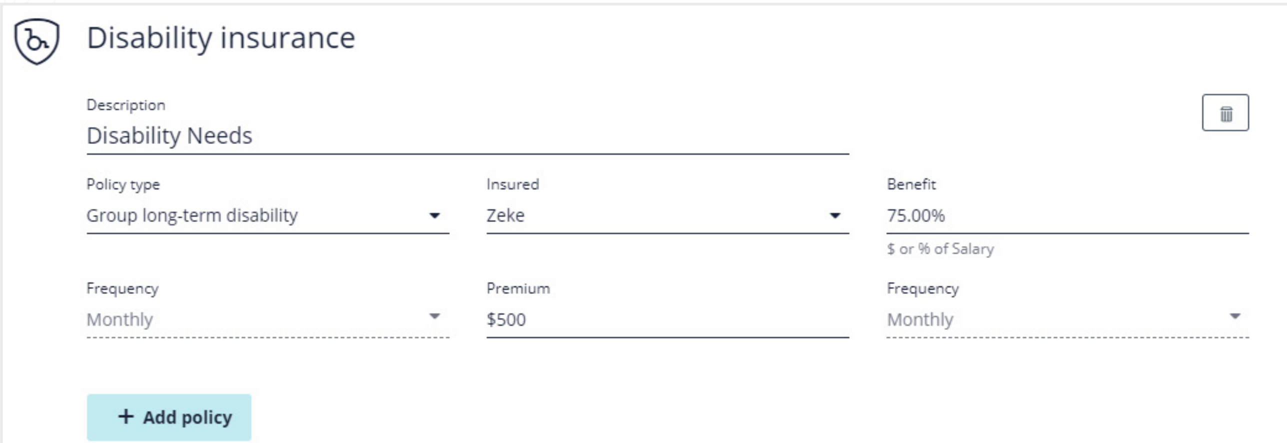
Account holding entry support

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.



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.



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).

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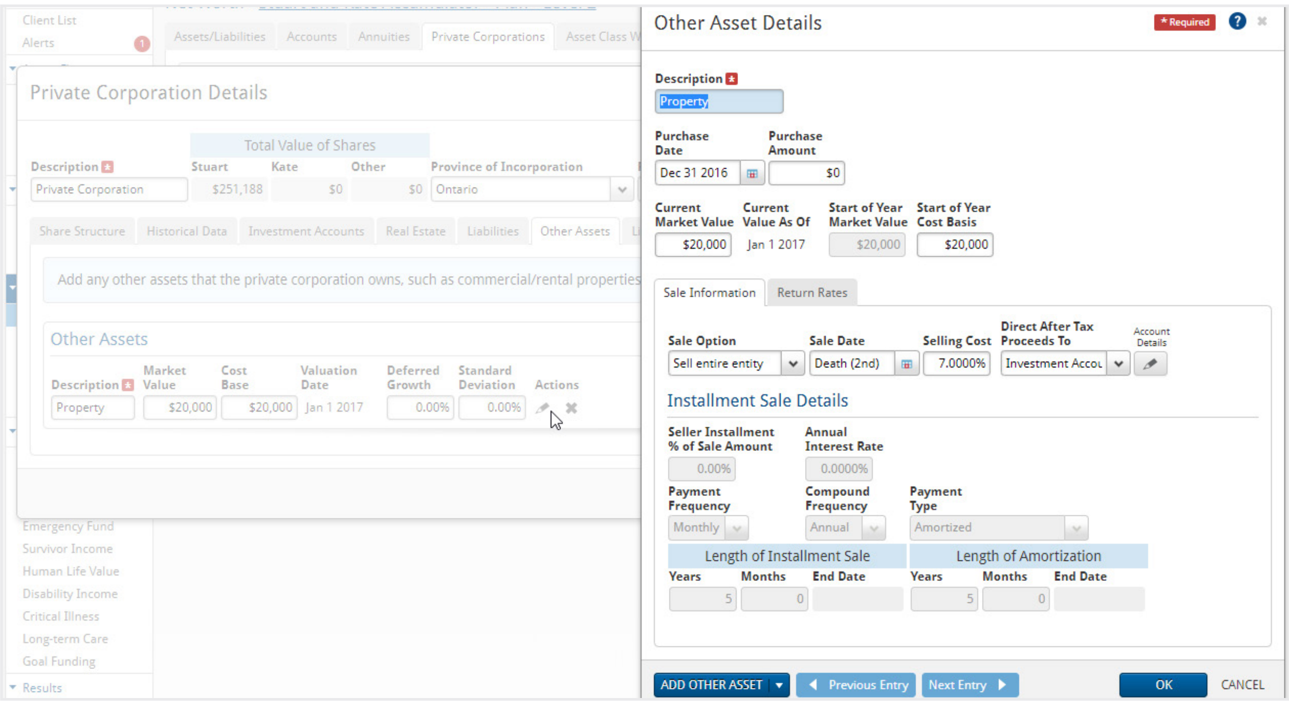
Enhanced private corporation functionality

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.



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