

NaviPlan[®] 19.1 release

July 19, 2019

NaviPlan 19.1 includes private corporation enhancements, Report Editor changes, and several additional improvements.

[Private corporation updates](#)

[Report Editor improvements](#)

[Client portal workflow changes](#)

[TIP support for LIF accounts](#)

Details

Private corporation updates



Note: To add operating company functionality to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

Operating companies are now separate from holding companies . Operating company entry supports

- Improved cash flow capabilities.
- Various historical data entry.
- Adjustable valuation settings.

Operating company support is another feature of the expanding ultra high net worth offerings in NaviPlan that ensures your clients' plans are accurate and realistic.



Note: Click [here](#) for more information on operating companies.

Holding Companies				Add Holding Co	
Total Value of Shares					
Description *	Market	Other	Other		
Holding Company	\$18,667	\$18,667	\$0		

To view or edit the asset allocation details for all holding companies : ?

Operating Companies				Add Operating Co	
Total Value of Shares					
Description *	Market	Other	Holding Company	Other	

Report Editor improvements



Note: To add the Report Editor to your current NaviPlan experience, contact Advicent at (855) 885-7526.

The client report disclaimer page is now customizable in the **Report Editor**. Customization ensures your firm's unique legal testimony is present in any client report.

Edit Report - Disclaimer ?

Preview: English French

Select a Section: Body Text Personality: personall... Disposition: *

Disclaimer

This analysis is hypothetical in nature and is intended to help you in making decisions on your financial future based on information that you have provided and reviewed.

Important: The calculations or other information generated by NaviPlan regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results.

Criteria, Assumptions, Methodology, and Limitations of the Analysis

The calculations used in this analysis are based on information provided and reviewed by you. Those assumptions must be reconsidered on a frequent basis to ensure the results are adjusted accordingly. The smallest of changes in assumptions can have a dramatic impact on the outcome of this analysis. Any inaccurate representation by you of any facts or assumptions used in this analysis invalidates the results.

We have made no attempt to review your property and liability insurance policies (auto and homeowners, for example). We strongly recommend that in conjunction with this analysis, you consult with your property and liability agent to review your current coverage to ensure it continues to be appropriate. In doing so, you may wish to review the dollar amount of your coverage, the deductibles, the liability coverage (including an umbrella policy), and the premium amounts.

This analysis does not constitute advice in the areas of legal, accounting or tax. It is your responsibility to consult with the appropriate professionals in those areas either independently or in conjunction with this planning process.

Results May Vary With Each Use and Over Time

The results presented in this analysis are not predictions of actual results. Actual results may vary to a material degree due to external factors beyond the scope and control of this analysis. Historical data is used to produce future assumptions used in the analysis, such as rates of return. Past performance is not a guarantee or predictor of future performance.

The results are based on your representation of risk and include information that is current as of 8/31/2015. You are responsible for confirming that the answers you provided to determine your individual risk tolerance, used in this analysis are accurately represented. The Proposed Plan asset allocation presented in this analysis is based on your answers to a risk tolerance questionnaire and may represent a more aggressive and therefore more risky-investment strategy than your current asset allocation mix. Actual return rates and performance may vary to a significant degree from that represented in this analysis.

Investments Considered*

This analysis does not consider the selection of individual securities; the analysis provides model portfolios. The results contained herein do not constitute an actual offer to buy, sell or recommend a particular investment or product. All investments are inherently risky. The asset class(es) and return rates used in the

English

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French

Cette analyse est par nature hypothétique et sert à vous aider à prendre des décisions sur votre avenir financier selon les renseignements que vous avez donnés et révisés.

Additionally, custom reports are duplicatable with one click. This change saves time and enables small template edits without recreating a custom report.

Client portal workflow changes



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

Pre-populated fact finders from **Draft** plans are now supported. **Draft** plan fact finders can merge into the original plan upon advisor acceptance. This change reduces the steps required to adjust financial data and allows for more client involvement in data entry.

Jun 26 2019

New Engagement... Edit View X Delete

Plans

+ New... Open View Plan Options... Mark as Delivered Publish... History... Workflow Notes X Delete

Description	Plan Year	Type	ID	Status
Plan	2019	Level 2	3907-1-1	Draft

Publish a plan to the NaviPlan client portal.
A client portal account must be available to publish a plan.

Temporary income provision (TIP) support for life income fund (LIF) accounts

TIP amounts can be included or excluded from LIF account data entry. This change improves accuracy in LIF entry and enhances planning flexibility.

Redemptions Return Rates **Registered Account Setup** Account Fee Setup

Setup

Elect payout in first year

Use younger partner's age for minimums

End-of-Year Market Value as of 2018 \$15,000

Use maximum payout amount

Include Temporary Income Provisions

Rate for determining maximum payout 6.00%

Supported platforms for NaviPlan[®] 19.1

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