

NaviPlan® 19.1 release

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 <u>Advicent</u> at (855) 885-7526.

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

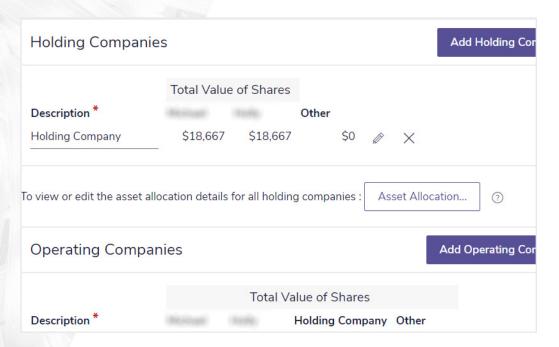
- Improved cash flow capabilities.
- Various historical data entry.
- Adjustable valuation settings.

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.



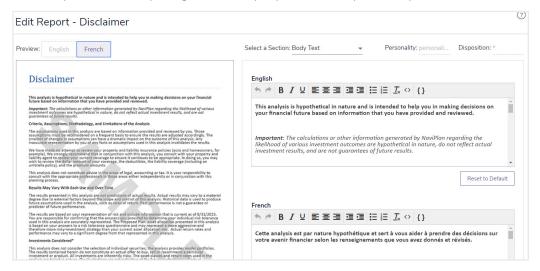


Report Editor improvements



Note: To add the Report Editor to your current NaviPlan experience, contact <u>Advicent</u> 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.



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

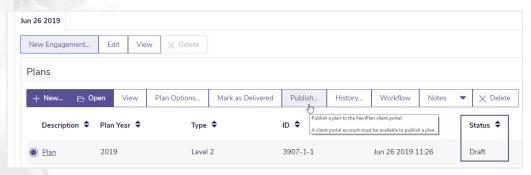


Client portal workflow changes



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.



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.

