

NaviPlan[®] 19.0 release

April 12, 2019

NaviPlan has been updated with a refreshed visual design, improvements to the report editor and the client portal, and various other updates.

[Visual design update](#)

[Report editor updates](#)

[Client portal improvements](#)

[Miscellaneous updates](#)

Details

Visual design update



NOTE: Click [here](#) for a detailed visual breakdown of specific usability changes.

NaviPlan has been updated with a refreshed user interface design. This includes:

- A clean, minimal design that puts data first, and avoids clutter and distractions.
- Better use of the page, allowing for optimized viewing on larger screens.
- Improved accessibility by increasing font size and color contrast.

Net Worth - David and Susan Pedderman - Plan - Level 2

QUICK ACTIONS ▾

Assets/Liabilities Accounts Annuities Asset Class Weightings << >>

Enter details about lifestyle assets, liabilities, income-producing real estate assets, and business entities. * Required

Lifestyle Assets

ADD LIFESTYLE ASSET ▾

Description *	Market Value	Actions
Residence	\$250,000	

Liabilities

ADD LIABILITY ▾

Click the **Add Liability** button to create a new row.

Real Estate

ADD REAL ESTATE

Description *	Market Value	Rental Income	Actions
Real Estate	\$200,000	\$1,500 /mo	

Assets/Liabilities Report



Net Worth

Quick Actions ▾

Assets/Liabilities Accounts Annuities Asset Class Weightings << >>

Enter details about lifestyle assets, liabilities, income-producing real estate assets, and business entities.

Lifestyle Assets

Add Lifestyle Asset ▾

Description *	Market Value	Actions
Residence	\$250,000	

Liabilities

Add Liability ▾

Description *	Balance	Interest	Payment	Link to	Actions
Personal Loans	\$125,000	8.000%	\$500.00 /mo	Residence ▾	

Real Estate

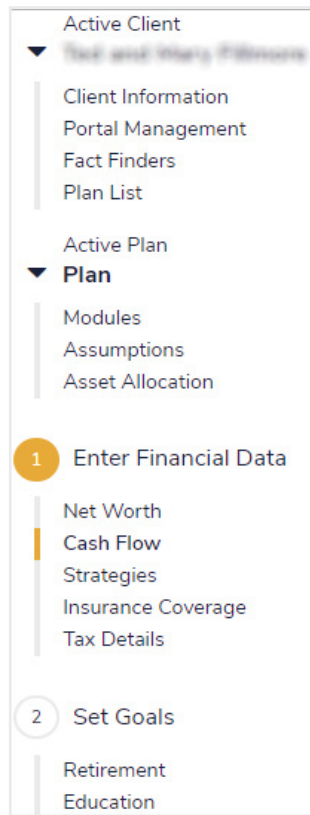
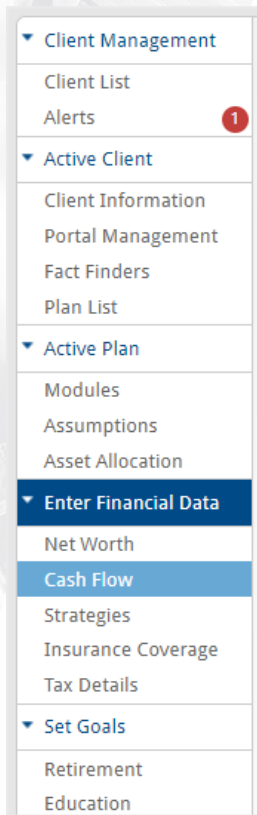
Add Real Estate

Description *	Market Value	Rental Income	Actions
Real Estate	\$200,000	\$1,500 /mo	

Assets/Liabilities Report

The refreshed NaviPlan user interface allows users to continue using NaviPlan without relearning workflows. Beyond the new look, these minimally disruptive updates have been implemented to improve usability and reduce clutter:

- The **Client List** and **Alerts** pages are now accessed on the top of global navigation.
- The left navigation is now focused only on the specific client and plan that is currently open.
- Some fields have been relocated to the details pop-up, streamlining the UI and reducing clutter.



Report editor updates



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

Graphs and tables from the modules listed below are now available for creating custom reports, allowing for a completely customizable report presentation. Reports using new components can be used in templates and can be made available in specific planning levels. Expanded component options include:

- Education
- Major purchase
- Emergency fund
- Human life value (HLV)
- Survivor income
- Disability income
- Long-term care
- Private corporations
- Critical illness



NOTE: Click [here](#) for a detailed list of all components available.

Client portal improvements



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

Improved data entry in the client portal

Clients can now include account savings strategies and variable life insurance subaccounts to their financial profile.

Saving strategies can be included or modified within any account via the **Current Savings** button. Information such as contribution amount, employer contribution, and contribution frequency can be included.

Description							
RRSP							
Account type	Owner	Market value	Holdings	Current Savings			
RRSP	Unknown	\$10,000	Add	(1)			

Current Savings

Contributions to your account

Owner (Pre-tax)	Max amount	Frequency	
\$100	<input type="checkbox"/>	Monthly	
<small>\$ or % of Salary</small>			

This change gives your clients greater control over their financial picture and saves time during the data entry process.

Advisor e-fact finder editing

Advisors can now edit or delete financial information before sending or accepting an e-fact finder.

This ensures the information in an e-fact finder is complete and accurate, saving time and giving more clarity to both clients and advisors.

The screenshot shows a dialog box titled "Review & Accept Fact Finder" with a help icon and a close button. It contains the following sections:

- Review & edit**: A section with the instruction "Review and edit the submitted fact finder in a new tab" and a button labeled "Open Fact Finder".
- Assign a name**: A section with the label "Plan Name" and a text input field containing the word "Plan".
- Choose how to create the plan**: A section with two radio button options:
 - Create a **duplicate** of the existing plan and add it to a new engagement
 - Project** the existing plan forward and add it to a new engagement

At the bottom of the dialog are two buttons: "Accept" and "Cancel".

Level 1 fact finder support

E-fact finders are now supported in Level 1 plans, adding additional plan flexibility. Pre-populated e-fact finders created from Level 1 plans will use Level 1 planning upon acceptance.

The screenshot shows a dialog box titled "Send Fact Finder" with a four-step progress indicator on the left:

- 1 Fact Finder Selection
- 2 Modules
- 3 Preview and Edit
- 4 Summary

The main content area is titled "Select a Fact Finder." and contains a section labeled "Fact Finders" with two radio button options:

- Blank Fact Finder
- [] Fact Finder

A dropdown menu is open for the second option, showing "Level 2" as the selected item. The dropdown menu lists "Level 1" and "Level 2", with a mouse cursor pointing at "Level 2".

Miscellaneous updates

Morningstar Updates

Morningstar provided updates for the following data:

- Asset class values
- Asset allocation questionnaire values

Selling Cost support for current asset lifestyle plans

The **Selling Cost** field is now available for **Lifestyle Asset** sale entry. This improves accuracy in the sale of lifestyle assets and factors sales costs automatically into reporting and cash flow.

Lifestyle Asset Details					
Sale Information					
Sell Asset	Sale Date	Selling Cost	Direct After Tax Proceeds To	Account Details	Exclusion Amount
<input checked="" type="checkbox"/>	Jan 1 2020	7.0000%			\$500,000
Projected Value as of Sale Dates		Projected Buying Power			
Before Tax	After Tax	Before Tax	After Tax		
\$0	\$0	\$0	\$0	\$0	

Supported platforms for NaviPlan[®] v19

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