NaviPlan®
by Advicent

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

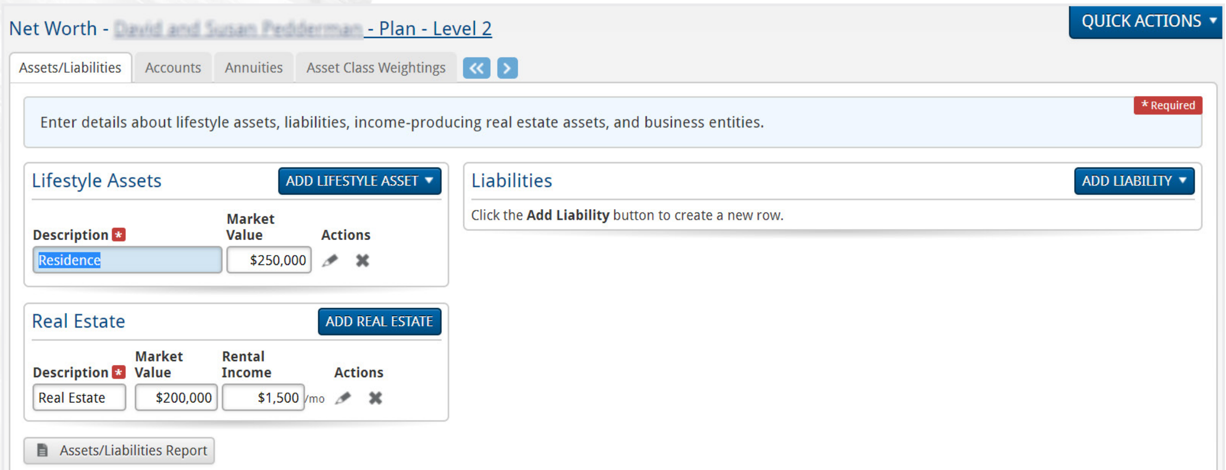
Details

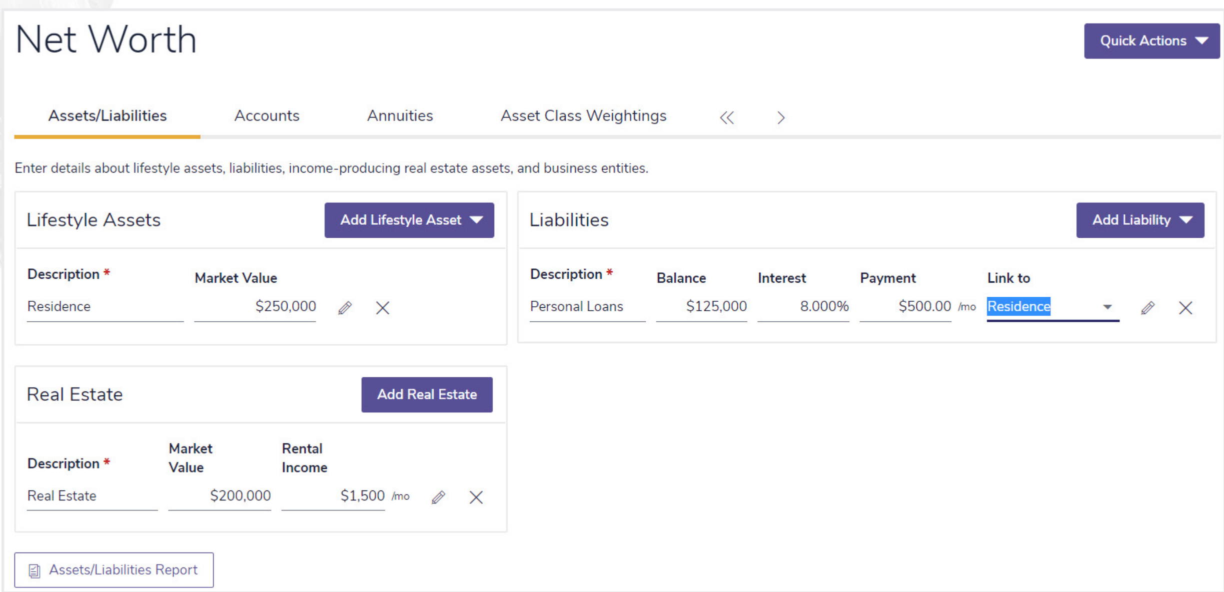
Visual design update

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 - - Plan - Level 2
QUICK ACTIONS
Assets/Liabilities
Accounts
Annuities
Asset Class Weightings
* Required
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
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
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Enter details about lifestyle assets, liabilities, income-producing real estate assets, and business entities.
Lifestyle Assets
Add Lifestyle Asset
Description *
Market Value
Residence
$250,000
Liabilities
Add Liability
Description *
Balance
Interest
Payment
Link to
Personal Loans
$125,000
8.000%
$500.00 /mo
Residence
Real Estate
Add Real Estate
Description *
Market Value
Rental Income
Real Estate
$200,000
$1,500 /mo
Assets/Liabilities Report

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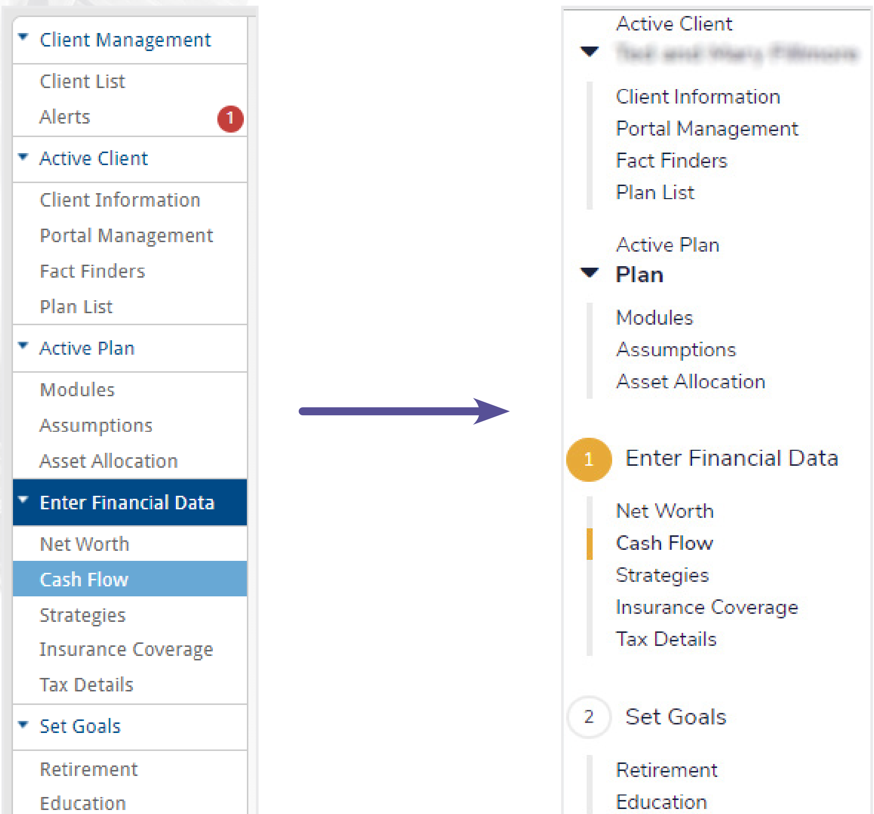
The refreshed NaviPlan user interface allows users to continue using NaviPlan without relearning workflows. Beyond the new look, these minimally disruptive updates have been implemented to improve usability and reduce clutter:

- 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.

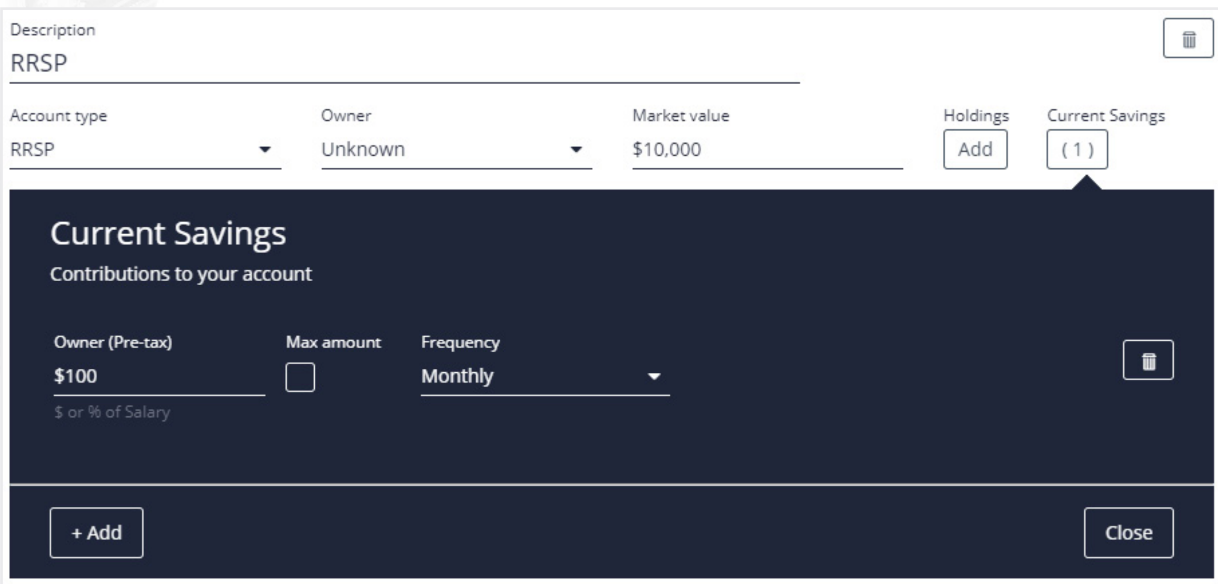
Client portal improvements

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.



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

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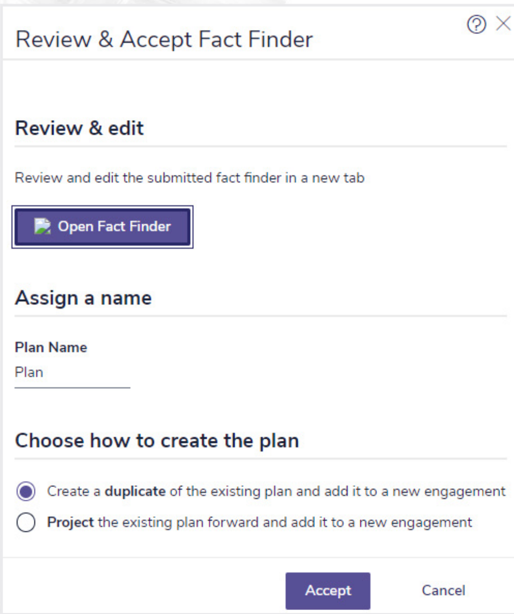
Advisor e-fact finder editing

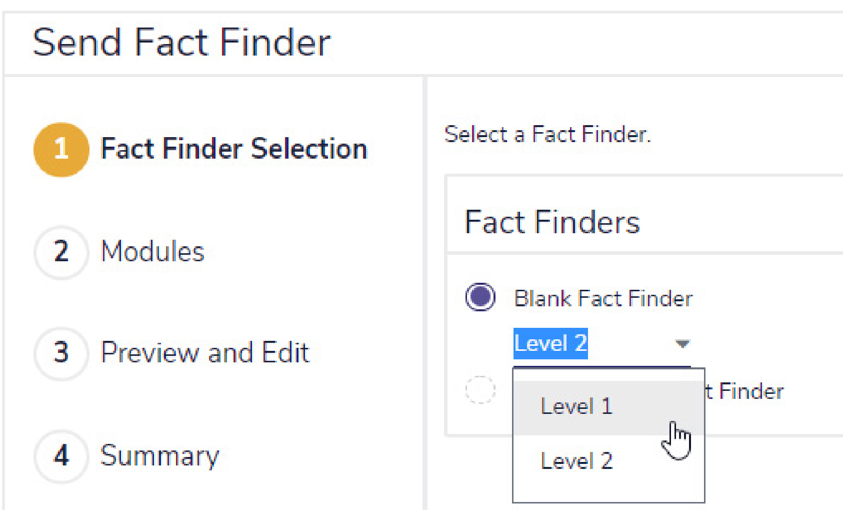
Advisors can now edit or delete financial information before sending or accepting an e-fact finder.

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



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.



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Miscellaneous updates

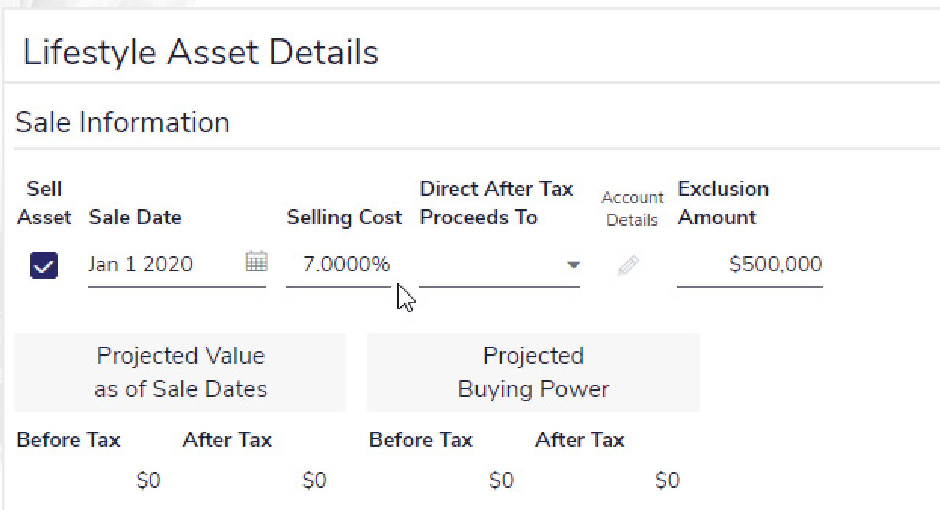
Morningstar Updates

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.



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