

WHAT'S NEW IN...

NaviPlan v12.2.0.0

Release Date: August 17, 2012

HERE ARE THE DETAILS

New miscellaneous functionality in NaviPlan® Select

- New look and feel; navigation bar is re-organized
- Enhanced keyword settings and start/end date offsets throughout the application
- Ability to enter annual advisor fees for managed accounts
- Ability to retire midyear
- Level 2 accounts and holdings structure now available in Level 1 Plans and Asset Allocation Assessments
- Life insurance proceeds can now be directed to an account or to cash flow
- Ability to specify the owner for surplus expense
- New default return rate for cash surpluses
- New Favorite Reports feature for quick access to reports
- Automated plan migration from NaviPlan® Extended Desktop to NaviPlan® Select
- Federal budget updates
- Peterson's Undergraduate Database update
- Improved multi-browser compatibility
- Pre-retirement redemptions
- Advanced Income types
- Added Retirement Distribution Summary client report
- Option to create retired clients

New User Preference settings

- Client report cover page preview for Advisor Details
- System setting to generate reports in grey-scale
- Annual account fees default for managed accounts
- Indexation defaults for pensions and education costs

New Holding Companies tab

- Modeling holding company investments and asset allocation
- Tracking of ownership structure, shareholder loans, Refundable Dividend Tax on Hand (RDTOH), dividends to shareholders, taxation, and more
- Holding company net worth, cash flow, and tax reporting

Presentation Module Player enhancements

- Improved content, style, and text for existing presentations
- Updated launch screen and toolbar for ease of use
- Updated workflow to be compatible with output Draft watermark
- Added new retired client presentation

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New interactive Scenario Manager

- What-if scenarios across all goals can be performed in one Alternative Plan
- Unlimited number of Alternative Plans per plan
- Side-by side comparisons of Current, Recommended, and Alternative Plans in Scenario Manager and in reports
- Ability to integrate one Alternative Plan as Proposed
- Slider bars can be used to solve goals (except critical illness)
- Instantly see the What-if effects on cash flow, net worth, and goals
- On-screen graphs to monitor cash flow and net worth
- Summary snapshot of goals met in the surplus or in the shortfall
- Access notes, reports, and graphs from inside scenarios

More What-if capabilities in Scenario Manager

- Cash Flow: Pensions
- Net Worth: Holding companies
- Strategies: Pre-retirement redemptions
- Retirement: New Blended Withdrawal liquidation order, Account Transfers, CPP and OAS benefit options, RRSP Maximizer, and a new Redemptions tab
- Education: Transfers
- Survivor Income: Death benefits and premiums, rates of return, ongoing expenses, annual incomes, and lump-sum needs
- Disability Income: Disability benefits and premiums, ongoing expenses, annual incomes, and lump-sum needs

2012 Federal Budget changes

The age of eligibility for Old Age Security (OAS) and Guaranteed Income Supplement benefits has changed. This change will start in April 2023, with full implementation by January 2029, and will not affect anyone who is 54 years of age or older as of March 31, 2012.

Client's Birth Year	Default Benefit Start Date
1958	65
1959-1690	66
1961 and later	67

2012 Provincial Budget changes

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Nova Scotia
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon

More resources available to you

NaviPlan® Select support: Help readily available – simply use the Help link in NaviPlan® Select or go to http://support.eisi.com/support_cdn/naviplan/v12.2.0.0/index.htm.

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Live support: In-depth, personalized questions? Our in-house NaviPlan® Select experts are ready to assist you. Contact Partner Support at 1 (888) 692-3474.

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SYSTEM REQUIREMENTS

NaviPlan® Select Premium Online system requirements

To run NaviPlan® Select Premium Online v12.x, your computer system requires the following:

Microsoft Word*	2003 +
Adobe Reader	9.0 +
Adobe Flash Player†	<i>Minimum:</i> 9.0.28 <i>Recommended:</i> 10.0 + (allows for interactive graphs)
Internet Browser‡	One of the following: <ul style="list-style-type: none"> • Microsoft Internet Explorer 7.0, 8.0, or 9.0 • Apple Safari 5.0 • Google® Chrome 8.0 • Mozilla Firefox® 3.6
Display	Resolution of 1024 x 768 +
Additional Requirements	Mouse of compatible pointing device

Note: The Presentation Module can be used on the iPad with Mobile Safari (iOS5).

*Only a requirement if reports are generated in rich text format (RTF).

†Requirement for running the Consumer Facing Application. Note that the browser must be run in 32-bit mode when using the Consumer Facing Application.

‡Your computer system must also meet all system requirements needed to run your browser of choice.

NaviPlan® Select Premium Offline system requirements

To run NaviPlan® Select Premium Offline v12.x, your computer system requires the following:

Operating System	One of the following: <ul style="list-style-type: none"> • Microsoft Windows XP • Microsoft Windows Vista • Microsoft Windows 7
Processor	<i>Minimum:</i> Pentium III 1.0 GHz (may limit application performance and the use of some features) <i>Recommended:</i> Pentium IV 2.2 GHz+
RAM	<i>Minimum:</i> 1 GB (may limit application performance and the use of some features) <i>Recommended:</i> 2 GB+
Microsoft Word*	2003 +
Adobe Reader	9.0 +
Adobe Flash Player†	<i>Minimum:</i> 9.0.28 + <i>Recommended:</i> 10.0 + (allows for interactive graphs)
Internet browser	Microsoft Internet Explorer 7.0, 8.0, or 9.0
Free hard disk space	350 MB +
Display	Resolution of 1024x768 +
Additional requirements	Mouse or compatible pointing device CD-ROM drive

*Only a requirement if reports are generated in rich text format (RTF).

†Requirement for running the Consumer Facing Application (CFA). Note that the browser must be run in 32-bit mode when using the CFA.