

WHAT'S NEW IN...

NaviPlan v14.0

WHAT'S NEW IN...

NAVIPLAN® FINANCIAL PLANNING APPLICATION

14.0

Release Date: September 30, 2013

NaviPlan's latest enhancements allow you to create thorough reports, hold more interactive meetings, and differentiate your business

- [Premiere of Next-Gen Reporting](#)
- [Ibbotson Asset Allocation](#)
- [Support for Long-term Care Insurance](#)
- [Life Insurance Quick Assessment \(LIQA\)](#)
- [Enhancements to Cash Flow engine](#)
- [Design and branding updates](#)
- [Improved Help system](#)
- [Updated tax and budget information](#)
- [Tax Support for Nunavut](#)
- [Additional Frequencies for Long-Term Care Benefits and Expenses](#)
- [NaviPlan® Learning Centre](#)

HERE ARE THE DETAILS

Create sleek and modern client reports with Next-Gen Reporting

Advicent Solutions is excited to offer our partners a brand new report creation experience in Next-Gen Reports. Next-Gen reports feature a sleek, modern redesign of the existing **Client Reports** with improvements to organization, content design options, and usability. Next-Gen Reporting includes a new report/template creation tool for you to quickly and easily build a report tailored down to the page to best serve your clients' specific needs.

The premiere of Next-Gen reporting will include the following categories:

- Asset Allocation
- Cash Flow
- Net Worth
- Retirement
- Supplementary Pages

HOW? To get started creating your own Next-Gen reports, see the *Next-Gen Reporting Quick Reference Guide (QRG)* located in the Advicent Solutions Learning Centre.

FEEDBACK After trying Next-Gen Reporting for yourself, use the **Feedback** form (located on the Next-Gen Reporting pages) to share your thoughts on features and functionality; your suggestions will impact the upcoming full release of Next-Gen Reporting.

Can I still use my existing Client Reports? Does Next-Gen Reporting fully-replace them?

You can still use all of the existing client reporting features in NaviPlan®. Next-Gen Reporting is simply a new feature that leverages modern design and improvements to report/template creation.

HOW? Access **Client Reports** in the same ways you always have. Navigate to the **Client Reports** page to begin.

WHAT'S NEW IN...

NaviPlan v14.0

HERE ARE THE DETAILS (CONTINUED)

What kinds of reports can I create using Next-Gen Reporting?

Currently, Next-Gen Reporting is able to create comprehensive reports for your clients' retirement goals.

Determine the optimal asset allocation for your clients using Ibbotson Asset Allocation

Quickly determine your clients' ideal investor profile with a built-in risk tolerance questionnaire, use pre-defined asset classes, and access the most up-to-date classification information using Ibbotson Asset Allocation.

HOW? To get started, contact Advicent Solutions partner support (888-692-3474) to turn on Ibbotson Asset Allocation. For a video tutorial, see the *Defining Asset Allocation Settings* training video clip located on the Advicent Solutions Learning Centre.

Support for Long-term Care insurance

Use NaviPlan® to recommend and sell Long-term Care insurance policies to your clients. These policies are covered in NaviPlan® in the same depth and style as other insurance goals (such as Critical Illness and Survivor Income).

HOW? To begin, go to the *Set Goals* category - *Long-term Care* section - *Objectives* page in any Level 1 or 2 plan.

Quickly demonstrate the benefit of additional insurance with Life Insurance Quick Assessment

Quickly determine your clients' additional life insurance needs and sell the solution with the Life Insurance Quick Assessment (LIQA). LIQA helps drive the sale of life insurance by focusing data entry on only the most important information. This allows you to quickly demonstrate your clients' needs for additional life insurance.

HOW? To get started with LIQA, go to the *Insurance Analysis* page in a Financial Assessment analysis level. For a video tutorial, see the *Using the Life Insurance Quick Assessment* training video clip located on the Advicent Solutions Learning Centre.

Will data entered into the life insurance quick assessment components affect the plan data I've entered?

No, information entered into quick assessment areas of the application will not affect plan data entered elsewhere. However, plan data can be utilized in the life insurance quick assessment in determining additional insurance need.

Report precisely and efficiently with enhancements to cash flow calculations and reporting

Better understand your clients' cash flow situation through detailed reporting. NaviPlan®'s upgraded cash flow engine includes:

- **More transparency:** Easily audit goal coverage and What Are My Options? (WAMO) values.
- **Enhanced precision:** NaviPlan® is more precise in its determination of *Goal Coverage* and *Needs vs. Abilities* values.
- **Better reporting:** Use the improved cash flow stand-alone reports to report on cash flow for individual goals.

HOW? From within any Level 1 or 2 plan, go to *Quick Actions - Reports - Cash Flow* and select any of the new reports.

WHAT'S NEW IN...

NaviPlan v14.0

HERE ARE THE DETAILS (CONTINUED)

Improve efficiency with updates to design and usability

Develop financial plans in an efficient, modern environment with NaviPlan®. Featuring design enhancements that improve usability by:

- Increasing white space.
- Refreshing the color palate.
- Reorganizing pages, sections, and containers for ease-of-use.
- Removing confusing or repetitive options.
- Highlighting commonly-used actions.

Where did the report button go?

Standalone reports are now available from the **Quick Actions** menu, located in the upper-right corner of each page in NaviPlan®. Use this menu to access reports, calculators, notes, and to switch to presentation view.

Why are some buttons blue now? Do they do something different?

No. Blue buttons add emphasis to screen items you will need to complete key workflows but they do not have any other special purpose.

Where did the Detailed Cash Flow module go?

All the functionality in the Detailed Cash Flow module is still in NaviPlan®. It has simply been integrated into the Detailed Tax Method.

Get help, access resources, and get back to planning quickly with help improvements

Find the answers to all of your questions quickly and easily with the new Help system for NaviPlan®. This new system includes:


- A modern and user-friendly design, built to enhance usability.
- Improvements in search functionality allow you to filter your results and quickly find content relevant to your needs.
- Procedure-based Help that provides step-by-step instructions for real workflows you use everyday.
- Printer-friendly versions of every page.

HOW? To learn the fundamentals of the new Help system, click **NaviPlan® Help...** from any location in NaviPlan® and click **The Basics** from the **Table of Contents**.

For a video tutorial on the new Help system, see the *Navigating the Help System* training video clip located on the Advicent Solutions Learning Centre.

Does the new Help system cover the same topics as the old one? How has the format changed?

Yes, the new system covers the same topics and more. However, Help content has been reorganized into step-by-step workflows. If you are having trouble finding the answers to your questions, use the search feature to find more information.

HOW? From within Help, enter your search term(s) into the field in the top-right corner of the screen. Select what type of Help you are searching for from the filter and then click .

WHAT'S NEW IN...

NaviPlan v14.0

HERE ARE THE DETAILS (CONTINUED)

Ensure your plans are up-to-date with the latest information

Taxation assumptions have been updated to reflect the most recent changes. Following are some of these key updates:

- British Columbia added an additional bracket for those making \$150,000 or more for 2014 and 2015. This bracket has a tax rate of 16.80% and will be eliminated in 2016.
- New Brunswick has new blended tax rates for 2013 and 2014
 - Due to New Brunswick's updated tax brackets, the province also has updated average tax rates
- Manitoba has an "other than eligible" dividend tax credit rate of 0.83% for 2014, down from 1.75% in 2013. For 2014, the enhanced rate gross up is still 38%. The existing general gross-up is decreased from 25% to 18%.
- New Brunswick increased its corporate tax rate (used for holding companies) to 12.00%, so the blended rate is increased to 11.00% for 2013 and 12.00% for 2014.

HOW? To see further details on the tax and budget updates, see the *2013 Tax and Budget Updates* document on the NaviPlan® Learning Centre.

Tax Support for Nunavut

NaviPlan® has been updated to include taxation support for the territory of Nunavut.

Additional Frequencies for Long-Term Care Benefits and Expenses

More real-life long-term care policies with additional benefit frequencies. The Long-Term Care module has been enhanced to add support for daily, weekly or monthly frequencies when entering both the benefits payable of a long-term care insurance policy and long-term care expenses.

WHAT'S NEW IN...

NaviPlan v14.0

NAVIPLAN® LEARNING CENTRE

Find training, support, and additional resources quickly and easily in the NaviPlan® Learning Centre. Use the Learning Centre as your first stop for finding supporting documentation, training opportunities, and the latest updates to NaviPlan®.

HOW? To access the NaviPlan® Learning Centre, open the **Help & Resources** menu from anywhere in NaviPlan®, then select Learning Centre.

TRAINING SPOTLIGHT

Learn more about v14 by attending one of these complimentary webinars:

- [September 30th 2:00 - 3:00 CT](#)
- [October 4th 1:00 - 2:00 CT](#)
- [October 10th 2:00 - 3:00 CT](#)

The following resources are available to help support your needs with NaviPlan®:

- Training Video Clips*
- NaviPlan® User Manuals*
- Quick Reference Guides*
- Functional Documents*
- Free Monthly Webinars
- Take Action series
- Training Catalogue
- Data Gathering Tools*
- Release Details

* These resources are available in both English and French.

Supported Platforms for NaviPlan v14.0

- Microsoft Word: version 2003 or higher
- Adobe Reader: version 9.0 or higher
- Adobe Flash Player: version 10.0 or higher
- Browser:
 - Microsoft Internet Explorer: version 8.0 or higher
 - Google Chrome: version 8.0 or higher
 - Apple Safari: version 5.0 or higher
- Display: 1024 x 768 or higher