

As a financial planning system, Dynamic Planner constantly evolves. Indeed, it has upgraded significantly in recent years. Big changes are obvious, but there are smaller ones, sometimes no less important, which you may have missed.

Today, in Dynamic Planner, you can...

- ▶ At a firm level, perform **product research** for a target market. Record your justifications. Utilise them within and streamline individual client recommendations
- ▶ Perform product research knowing that the features filtering your research have an associated client need or benefit
- ▶ At a firm level, research **investment solutions** for a target market. Record your justifications. Utilise them within and streamline individual client recommendations
- ▶ Evidence and link to a **target market**, all completed research for products and investments solutions which are suitable. Record your justifications
- ▶ Upload your investment solutions using a simple spreadsheet to minimise rekeying and errors
- ▶ Define your different target markets of clients, to accurately reflect your clients' needs
- ▶ Evidence that you have considered your clients' needs and conducted research to fulfil them in line with the Consumer Duty
- ▶ Access **independent, whole of market** platform and product data to assist with your research
- ▶ Check which share class is available on which platform, or which platform holds a certain investment solution. Solutions not available are highlighted, so you can efficiently choose an alternative
- ▶ Access independent, whole of market investment solutions research
- ▶ Access independent research for DFM MPS
- ▶ In an Income Focus Research report, analyse income and return characteristics, alongside risk analysis, which is both forward-looking and historic
- ▶ At the click of a button, understand your client's attitude to risk, capacity for loss, sustainability preferences and investment experience
- ▶ **Meet Consumer Duty** requirements by matching your client to a suitable portfolio that meets their investment preferences
- ▶ Meet Consumer Duty requirements by documenting why a product or investment solution is suitable for your client
- ▶ Understand your client's long-term financial goals and show them their financial journey through the use of interactive, and dynamic **cash flow modelling**
- ▶ Improve your client's long-term financial plan by putting their money to better use now
- ▶ **Demonstrate the value** for money of your advice by showing your client how they can improve the outcomes in their financial plan
- ▶ Educate your client on the potential losses and gains of their portfolio through rigorous, stochastic financial modelling
- ▶ Show your client the ups and downs of investing by 'showing investment paths' in their cash flow plan
- ▶ Build your client's financial resilience by having conversations around the potential losses they may experience in the short-term
- ▶ Benefit from academic rigour and original research in **behavioural science** into client behaviours



- ▶ Provide your clients with professional, **magazine-quality reporting** communicating clearly your advice and research
- ▶ Meet annual regulatory requirements about the fair treatment of **vulnerable customers**, by ensuring your clients complete a financial wellbeing questionnaire
- ▶ Watch videos of fund managers and quickly understand what their investment solutions do, to help you explain it to your client
- ▶ Ask your client to input all their assets online, potentially discovering ones you did not know about
- ▶ Rebalance a portfolio and produce individual, MIFID-compliant sell and buy **suitability disclosure** in minutes
- ▶ Meet MIFID requirements explaining any credit risk, liquidity risk and complexity in your client's portfolio, by issuing an Investment Progress Review report
- ▶ Amend and add wording in any report. Add imagery and tables. Create different default versions for your different **target audiences**
- ▶ Identify **DFM MPS** which have good, aggregate past performance by searching by 'Premium' and 'Select' solution ratings
- ▶ In a **Risk Report**, view, understand and explain the risk an investment solution has been taking over time, and where that risk has come from
- ▶ In an MSCI **ESG** Fund Report, view, understand and explain the impact ESG factors have on an investment solution
- ▶ At a glance and when reviewing if they are meeting their objectives, analyse your client's **portfolio performance and risk**
- ▶ At a glance, analyse recommended changes to your client's portfolio, to determine the best client outcome
- ▶ Import your client's data from a variety of **back offices**, including intelliflo office, Time4Advice and Iress Xplan
- ▶ Import your client's **valuation data** daily direct from 20+ platforms and providers, ensuring you're sharing the latest information
- ▶ **Invite your client** to a branded and customised space, where your profile as the adviser / firm is front and centre
- ▶ Invite your client to securely share with you key information, in their own time, to ensure your advice is relevant. Free time to spend it where you add value
- ▶ Share your client's risk and sustainability profiles with them as soon as they have completed questionnaires
- ▶ Educate your client with videos about risk and sustainability
- ▶ As they remotely complete actions you have requested, **engage your client** with insights about their finances
- ▶ Improve the quality of data that you capture from the client, through easy-to-use client interfaces
- ▶ Manage and upload your client documents
- ▶ Manage and create relationships between different clients
- ▶ Across your firm, view and manage all invitations and actions you have requested from clients
- ▶ Delete or reassign existing clients within your organisation