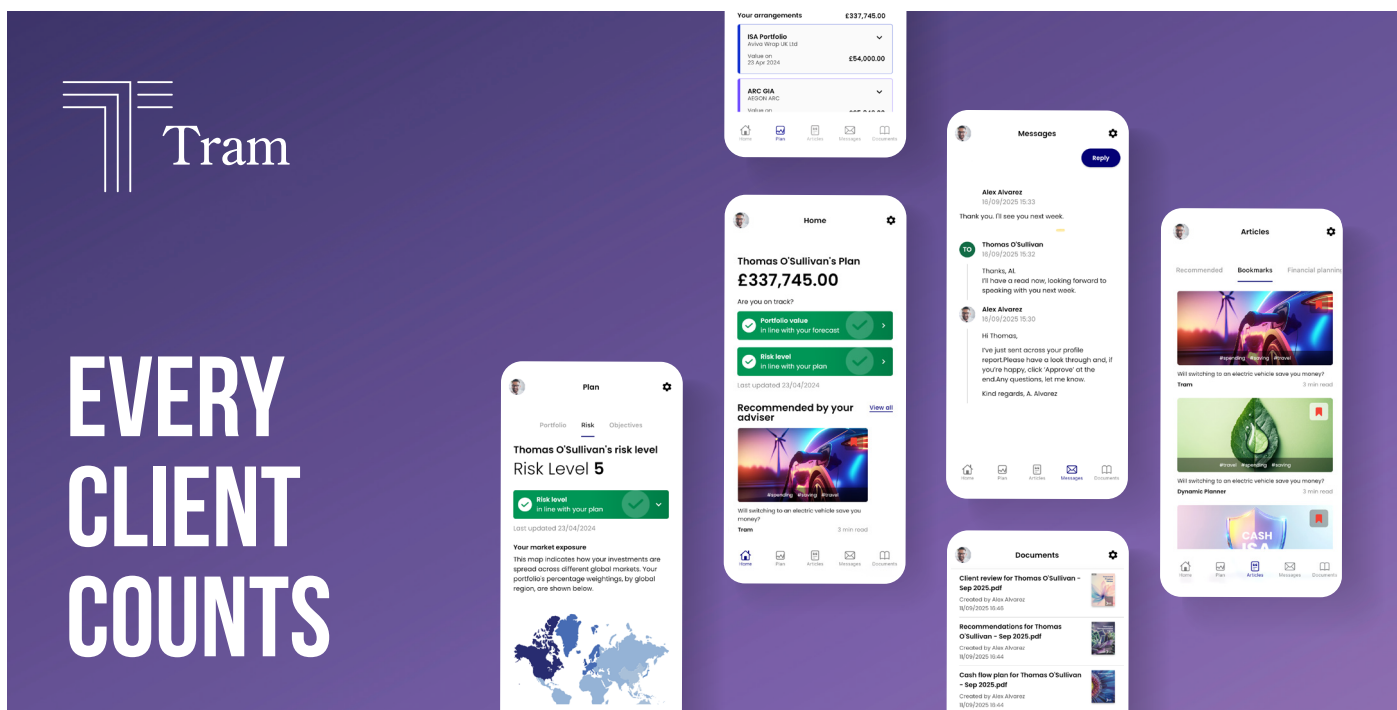




Connect differently.

Tram is the new mobile app from Dynamic Planner that helps you and your clients stay connected in a simple, secure way. It puts the financial plan where clients live their lives, on their phones, strengthening your connection and making advice personal.

Designed from day one for the end client, Tram delivers daily valuations, clear risk information, documents and cash flow plans in a warm beautiful app. It is fully branded to your firm, includes secure messaging, and offers a growing library of curated content for you can share.

Smartphones are the device people trust and use most each day. In-app notifications are seen and acted on quickly, making it easier to serve clients your way and build a visible record of client engagement to demonstrate value under Consumer Duty.



Advice that fits into everyday life

- ✓ Support and evidence your Consumer Duty commitments
- ✓ Engage every client at scale to increase capacity in your firm
- ✓ Offer a modern digital experience that shows ongoing value
- ✓ Keep your brand front and centre with full firm branding
- ✓ Share information and documents in a secure client space
- ✓ Benefit from in app notifications for fact find requests and messages
- ✓ Capture document approval inside the app
- ✓ Share engaging articles direct from you or from a pre-approved library of personal finance content

What do end-clients say about Tram?

"My favourite thing about it has got to be the fact that you are in control. You can see exactly where you're at with what money that you've got"

Karen Bentley



Connect differently

Deliver your service where clients live their lives. Secure messaging, instant approval and in-app notifications keep you present between meetings and keep a clear record of ongoing engagement.



Clients love it

Clear screens, valuations, risk levels and documents all beautifully presented in one secure place, keeping your clients informed and reassured and deepening your relationship with them through a new kind of connection.



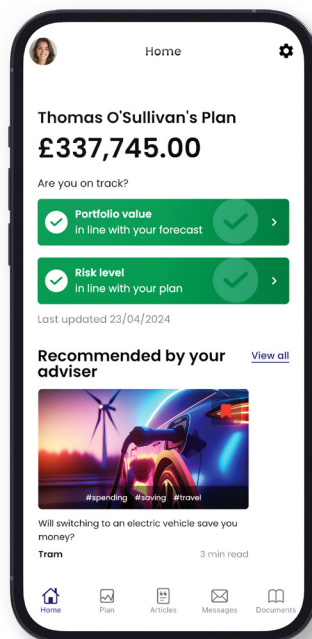
You choose

Freedom to service any client, your way. Deliver premium, high touch where it counts and light touch at scale. Segment by need, share what matters and keep a clean record of engagement, all in one fully branded app.

Provide peace of mind with up-to-date valuations.



Deliver constant support with curated articles or write your own.



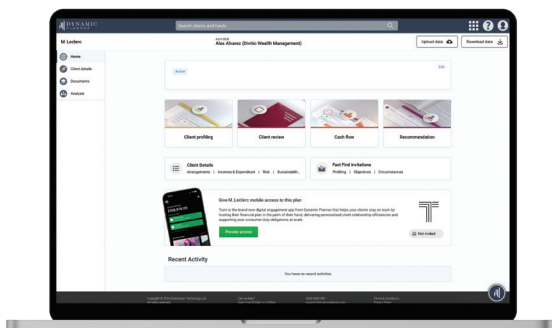
Be in the palm of your client's hand with in-app notifications and digital fact find.



Connect differently with secure, two-way messaging, document approval and file sharing.



Evidence value by sharing your client's plan, wherever they are.



How would I manage access for clients?

Access is managed through Dynamic Planner. You invite clients, they receive an email with simple instructions and a secure link to activate their account. Most clients are up and running in minutes.



Scan the QR code to find out more about Dynamic Planner and Tram.