

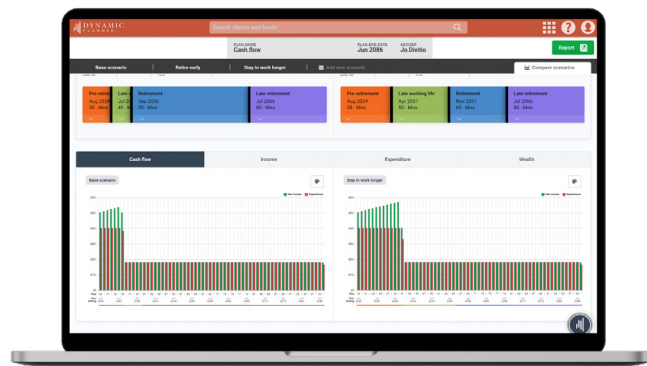
Transform your cash flow modelling

Utilise Cash Flow scenarios in Dynamic Planner to enhance the way you deliver your services to clients. Compare and forecast multiple scenarios to help them plan their future. Whether they want to change their retirement age, relocate abroad or plan their estate, our Cash Flow module gives you all means to support your clients' future plans.

Benefits of Cash Flow scenarios alongside Dynamic Planner

Plan for any future, no matter how unique

No one can say for sure what the future holds, we all have varying goals and ambitions, but the one certainty is the value of discussing different outcomes. Cash Flow provides you with the power to plan and compare multiple scenarios with ease, exceeding your clients' expectations and modelling their life choices, no matter how off the wall they may be.



Provide comprehensive value to your clients

Increase your client engagement through easy-to-understand models which you can build at a click of a button. Show them graphs which clearly convey differing scenarios and demonstrate real value.

Prompt conversations between you and your clients

Whether you're looking to meet with your clients face-to-face or provide them with an email report, Cash Flow gives you the perfect opportunity to dig deeper into your client goals and provide them with a meaningful experience.

Don't just take our word for it



“ I have been able to intuitively use it. It's easy - certainly the easiest cash flow modelling tool I've used. Another tool might be all singing, all dancing, but have you really got the time to learn its intricacies, to make full use of it?

David Mills, Ridgeways Financial Planning

Utilise existing Dynamic Planner information

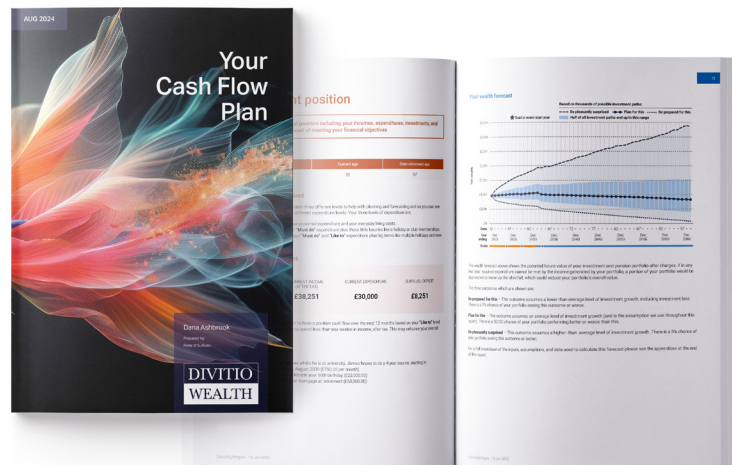
Use your existing client information in Dynamic Planner to accurately and efficiently model cash flow scenarios, giving you the peace of mind in your data and reducing the time spent per client.

Multiple scenarios

Create multiple scenarios in a single plan and compare them on a dedicated scenario screen, providing you with the opportunity to plan for different possible futures and outcomes.

New client report

Add your cash flow scenarios to your client reports to provide them with powerful and comprehensive reports, allowing you to deliver the most value possible.



Scan the QR code
for more information



Like to find out more?

Email us at support@dynamicplanner.com

We'd love to learn how our software can help transform your business