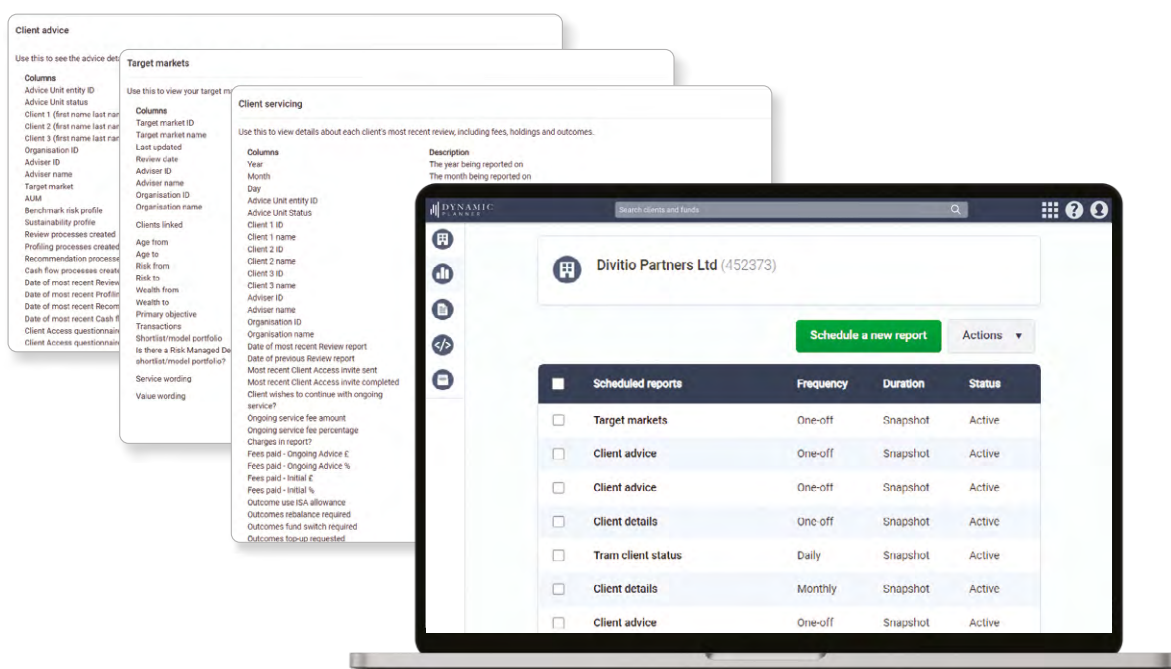


Dynamic Planner Insights

Simplified MI for decision making and compliance

Financial advice firms are increasingly data driven. To thrive they need actionable information to better understand their customers, optimise their operations and make informed decisions about target markets and business efficiencies.

As a result, we have invested in building a new Insights module which will provide enhanced information to meet this need. This powerful reporting delivers regularly scheduled data on client demographics, profiling, target markets, advice processes and client interactions through our platform and mobile app, Tram.



Stay ahead with regularly scheduled data on your processes and client activity

Access Insights data as one-off requests or schedule monthly updates to maintain a clear, up to date view of your firm's activity within Dynamic Planner.

Dynamic Planner Insights includes:

- ▶ **Platform usage** (e.g. track number of users, completed annual reviews)
- ▶ **Entered data** (e.g. view client lists and other inputs)
- ▶ **Analysis** (e.g. assess client risk and sustainability profiles)
- ▶ **Outputs** (e.g. review recommendations made)
- ▶ **Client activity** (e.g. monitor interactions in Tram)
- ▶ **Client servicing report** (helping fulfil the FCA's requirements)



Learn more
Scan the QR code
to find out more





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