

Dynamic Planner Target Markets

Faster, compliant client servicing

Defining your firm's target markets is both best practice and essential for compliance. The FCA mandates the clear identification and justification of consumer segments to ensure and evidence the suitability of ongoing advice. While this process directly benefits the firm by developing clear propositions for their clients, it can be labour intensive. Dynamic Planner's unique capabilities allow you to collate this information with speed, clarity, and confidence.

Our Target Market tool simplifies the process of identifying, defining, and justifying appropriate client segments, which pull through to our Recommendations module to save you valuable time on suitability reporting.

Dynamic Planner Target Markets allow you to:

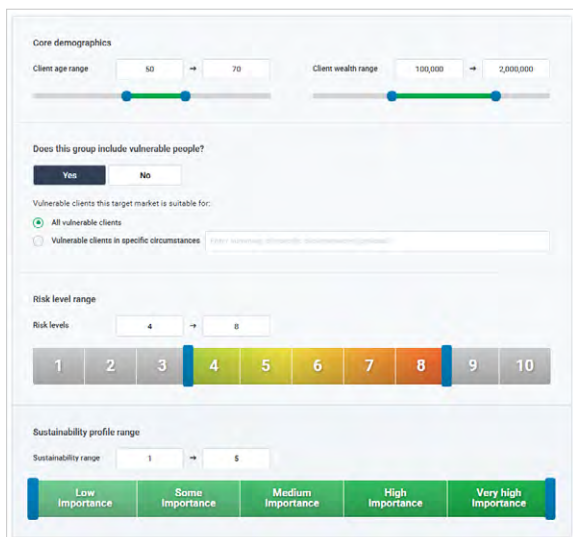
- ▶ Segment clients by age, wealth, risk profile, sustainability preferences, product complexity and vulnerability.
- ▶ Align recommendations to each segment with compliant shortlists.
- ▶ Evidence suitability through integrated research and reporting tools.

How it works

- ▶ **Define:** Use intuitive tools to build and define your target markets and link them to shortlists.
- ▶ **Justify:** Generate audit-ready documentation that supports your segmentation logic.
- ▶ **Deliver:** Pull through into suitability reports, ensuring every client receives advice that's to their target market
- ▶ **Communicate:** Present timely articles to your target markets through the Tram app.

Built for efficiency, precision and client-centric advice

- ▶ **FCA-aligned:** Our target markets are designed to meet regulatory expectations.
- ▶ **Timesaving:** Eliminate rekeying – use saved research and wording across clients and reports.
- ▶ **Self-reporting:** Schedule regular Target Market MI reports to stay on top of target market usage in your firm.



The screenshot shows the 'Core demographics' section of the tool. It includes sliders for 'Client age range' (set to 50-70) and 'Client wealth range' (set to 100,000-2,000,000). Below this is a section for 'Does this group include vulnerable people?' with 'Yes' and 'No' buttons. Underneath, there are radio buttons for 'All vulnerable clients' (selected) and 'Vulnerable clients in specific circumstances'. The 'Risk level range' section shows a slider for 'Risk levels' (set to 4-8) and a row of 10 colored buttons (1-10) with button 4 highlighted. The 'Sustainability profile range' section shows a slider for 'Sustainability range' (set to 1-5) and a row of five colored buttons (Low, Some, Medium, High, Very high importance) with the 'High importance' button highlighted.



Learn more
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