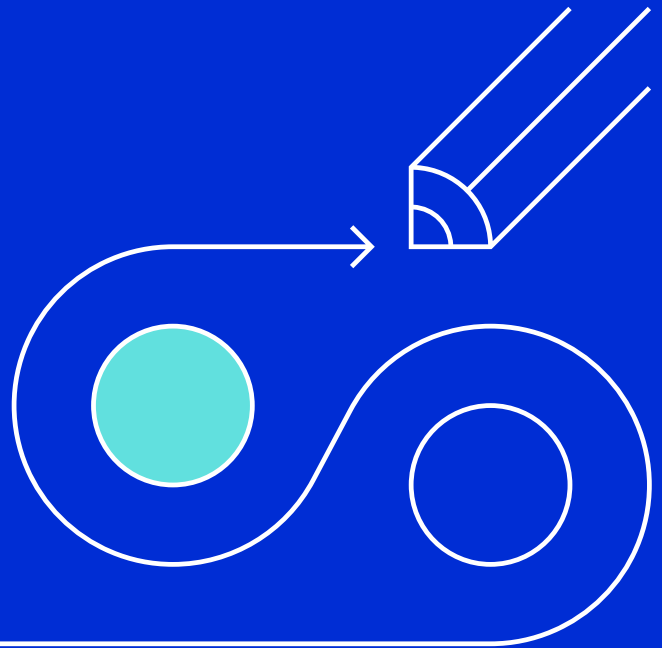


# intelliflo planning

## What's new

Upgrading from i4C to intelliflo planning



## Contents guide

### Page 3


- General
- Graphs
- Graphs scenario mode
- Tables

### Page 4

- Asset tree
- Projection graphs
- Exporting
- Tables
- Firm level assumptions
- Narrative
- People and case
- Possessions
- Property & mortgages
- Business
- Liquidation order
- Investments

### Page 5

- Pension
- School fees
- Expenses
- Protections
- Scenarios
- intellilo office integration
- Support
- User management



**intelliflo** planning retains the core essence of what we all loved about i4C but introduces a number of improvements as well as a reimagined UX.

This user guide details the high level changes in intelliflo planning. Further details can be found in the community and via the in-solution support.

### General

- Significant increase in speed

### Graphs

- Improved visual display and scaling
- Integrated timeline access by enabling “events” on the graphs
- Improved graph carousel for changing between graphs
- Double click on a bar to be taken to relevant table and year
- Graphs resize to last death
- Default death ages of a new client is life expectancy plus 20 years
- Years and ages can be displayed together
- Chart navigator to help you zoom into specific years

### Graphs scenario mode

- Compare graphs above and below as well as side by side
- Options to compare graphs without displaying scenario differences at the same time
- Tooltips display for both graphs at once with differences highlighted

### Tables

- Compare tables of two scenarios side by side
- Expand mode to view all years of a column of data at once
- Money in and out tables combined into the cashflow table
- Drill down functionality to see underlying assets and plans which make up totals
- Data tables can be exported directly from the tables page

<b>Asset tree</b>	<ul style="list-style-type: none"> <li>• Improved visual display</li> <li>• Add assets and plans from the asset tree</li> <li>• Edit existing assets and plans from the asset tree</li> </ul>
<b>Projection graphs</b>	<ul style="list-style-type: none"> <li>• Now viewable in both real and nominal</li> </ul>
<b>Exporting</b>	<ul style="list-style-type: none"> <li>• Improved sizing of graph and legends</li> <li>• Single scenario export includes timeline</li> <li>• Export ages and years on graphs</li> </ul>
<b>Firm level assumption</b>	<ul style="list-style-type: none"> <li>• Now includes Inflations; Surplus % Saved and Expenditure on Death</li> </ul>
<b>Narrative</b>	<ul style="list-style-type: none"> <li>• Improved layout</li> </ul>
<b>People and case</b>	<ul style="list-style-type: none"> <li>• Case name and surname can be edited</li> <li>• “known as” used throughout solution rather than “person 1” or “spouse”</li> <li>• Person icon colour can be selected</li> </ul>
<b>Possessions</b>	<ul style="list-style-type: none"> <li>• Now on their own tab (no longer under the property tab)</li> <li>• Not inflated on year of purchase</li> </ul>
<b>Property &amp; mortgages</b>	<ul style="list-style-type: none"> <li>• Unlimited mortgages can now be added</li> <li>• Easier to adjust future mortgage rates with year ranges</li> <li>• Property not inflated on year of purchase</li> </ul>
<b>Liquidation order</b>	<ul style="list-style-type: none"> <li>• Liquidation order of investments and pensions managed on a new page. Plans can be prioritised and excluded from liquidation via drag and drop</li> </ul>
<b>Investments</b>	<ul style="list-style-type: none"> <li>• Default unit trust renamed “surplus account”</li> <li>• Joint ISAs are no longer allowed</li> </ul>

## Pensions

- Unlimited contribution strategies can now be added
- Unlimited withdrawal strategies from the crystallised pot
- As-required withdrawals no longer automatically stop if the owner has breached their lifetime allowance limit before they reach age 75

## School fees

- Now added under the expenses section
- Ability to adjust current school year

## Expenses

- Expenditure on death % can be set for custom expenses
- General expenditure form and categories simplified
- Loans now have their own input page

## Protections

- Form redesigned so input fields are based on policy type

## Scenarios

- Scenario description can be added

## intelliflo office integration

- White labelling in intelliflo office flows through to intelliflo planning
- Additional Defined Benefit (DB) pension fields mapped
- Additional protection fields mapped
- Mortgage fields mapped
- Expense fields mapped

## Support

- In-solution support can be accessed via the interactive help button
- Single sign on into the community via the community and support button

## User management

- Client access aligned to intelliflo office with the use of group hierarchy and roles