

PAS - Financial Planning

Flexible and comprehensive on-line planners enabling effective pre and post Retirement Planning

Designed to:

- facilitate the creation and review of investors plans, helping them to stay on track
- provide a holistic view of all assets in retirement, making plans more realistic and achievable
- assist clients to take control of their retirement planning and engage them with their future

Providers, advisers and customers are increasingly looking to technology to enhance their Financial Planning. They require flexible solutions that they are able to adapt to their circumstances and provide comprehensive analysis that is intuitive and easy to understand.

Our Financial Planning solution supports financial services professionals in conducting planning activities and providing informed and compliant pre and post retirement planning advice.

The PAS – Financial Planning Solution

Our Financial Planning solution can be deployed as a highly sophisticated web-enabled retirement planning tool for pension providers, advisers and customers. It is an online data aggregation and financial planning system enabling advisers and their clients to see their total projected wealth and make informed planning decisions

For pre retirement, our solution can be used to:

- Target a level of income
- Calculate required level of contribution
- See the affects of different retirement ages
- Understand the impact of inflation
- Calculate the investment return required

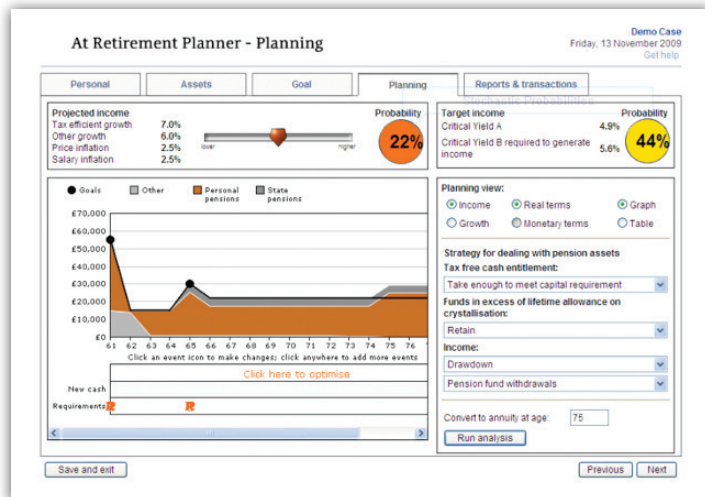
For post retirement, our solution can be used to:

- Manage Income Drawdown
- Calculate required supportable level of withdrawals
- Explore different income strategies

Our Financial Planning software has been integrated with portfolio planning and asset allocation calculations, provided by a specialist third party. This enables the combination of both deterministic and stochastic projections and allows provision of:

- The projected outcome on a deterministic basis
- The stochastic probability of achieving the growth rate implicit in the deterministic basis
- The Critical Yield (Investment Return) required to meet a target
- The stochastic probability of achieving the Critical Yield

Our solution can be integrated with back office data so that plans can easily be kept up to date and reviewed.



Contact us

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