Distribution Technology

Enriching relationships

Dynamic Planner Enterprise Factsheet

Looking for front office and planning tools to support your RDR transition?

Do you need help with your RDR transition?

As part of moving to the new RDR regime, owners of advice firms are rethinking their propositions and deciding which business models will be the most appropriate for them going forward. A technology review is a key part of this process – for example, ‘how is technology currently used and what opportunities can it offer to improve efficiency and the customer experience?’

Dynamic Planner can help - whether you are looking for effective planning tools or technology to cover the complete financial planning, sales and servicing process.

What we offer

Dynamic Planner Enterprise supports the whole planning, sales and servicing process. It combines our market leading and powerful planning tools, such as risk profiling and asset allocation, with a client management and reporting system that’s integrated with the leading platforms and portals.

How well does your technology help your customer acquisition, fact finding, formulating advice, reporting and reviews?

Dynamic Planner Enterprise helps advisers to enrich their customer relationships – be that in selected need areas, such as investing, retirement or protection or across the whole range with holistic planning and servicing. It is ideal for advisory businesses with more than 25 advisers.

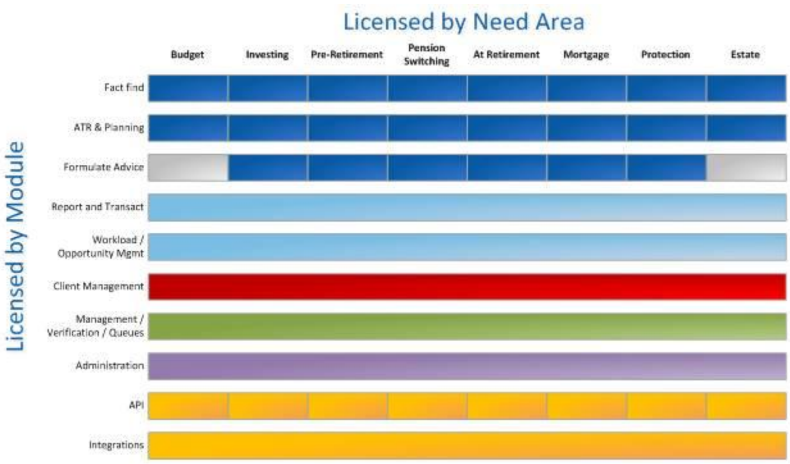
Availability

You can choose to have Dynamic Planner Enterprise ‘on demand’ as a hosted service, or opt for a version that’s customised. That’s because it is highly configurable, which means you can choose the complete package, or select one or more specific modules to fit your proposition. For example, some leading insurers and advisory businesses have chosen to use our investing and retirement modules, while other organisations have selected the complete Dynamic Planner Enterprise package.

Which modules could help your business?

Each module comes with subject-appropriate fact find questions, planning tools and integrations along with core functionality for reporting and transacting. In addition, you can opt to add extra functionality such as, client management, business management and administration.

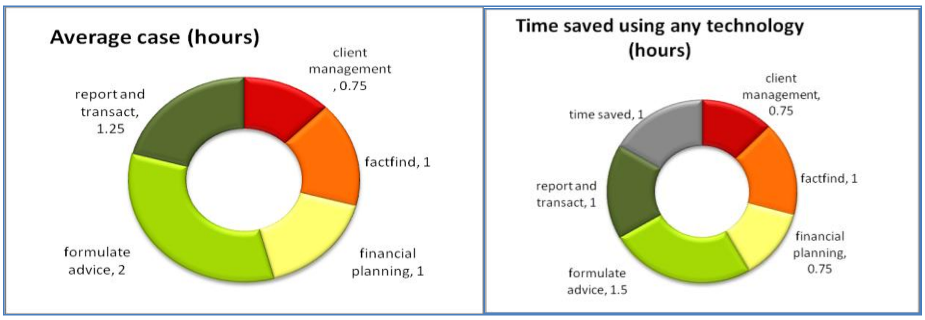
Dynamic Planner Enterprise



Improving efficiency

A survey[1] we conducted in 2008, identified that 67% of registered adviser users found that Dynamic Planner helped to save them time when it came to retirement and pension planning. In fact, this year, we estimated that if the technology is effectively employed and the end-customer is also involved in entering data, the average time to complete a case is reduced from six to three hours, thus halving the time.[2]

“A problem shared, is a problem halved”



You and your RIs can then choose how to use that time saved.

Dynamic Planner Enterprise has proven technology to improve your business, with:

- Reduced data re-entry
- Straight through processing
- On-line servicing
- Integrated report production

"Verbatim employs Distribution Technology's planning tools to move beyond traditional labels 'cautious', 'balanced' and 'adventurous' towards a proposition with proper risk assessment at its heart."

Matthew Timmins, CEO, Simply Biz

Improving the customer experience

Using Dynamic Planner Enterprise enables advisers to enrich their relationships with their customers. You will benefit from greater interaction and improved understanding that comes from:

- assessing and profiling attitude to risk
- identifying financial needs and alternative planning scenarios
- integration with leading portals for quicker processing
- creating easy to understand, personalised financial plans with insightful graphics and data

Compliance and business management

Using Dynamic Planner Enterprise can transform adviser productivity, while ensuring the quality of the advice is maintained and consistent. Thanks to the proven technology, integrated with leading portals, it offers you:

- consistency and conformity in the advice process and treating customers fairly
- complete client management – from lead generation to regular reviews
- enhanced management reporting and documentation
- smoother, efficient processing of quotes and applications
- easy yet powerful configurable options to meet your organisation's needs
- audit trails and rule-based file checking to support your centralised compliance
- ability to provide different levels of permissions to individuals within your organisation
- salesforce performance management support

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Key features and benefits

Choose a company with 16 PPP awards from F&TRC and you're on to a winner

Dynamic Planner Enterprise is a powerful, full featured front-office tool to support advisers in giving consistent and compliant advice. It offers a cost-effective way to enhance sales and improve customer experiences – smoothing your RDR transition. Choose the whole package or select the modules you need.

Process	Dynamic Planner Enterprise at a glance
Fact find	• Choose focussed, multi-need or holistic versions • Record existing arrangement with current valuations • Includes income and expenditure • Add goals and future liabilities • Add soft facts and notes
Financial planning	• Cashflow and affordability • Investing • Pre-retirement • Pensions switching • At Retirement • Property & Mortgage • Protection • Estate
Formulate advice	• Recommend new products and policies • Produce quotations • Analyse funds and assets
Report and transact	• Produce suitability and customer reports • Record commission expectations • Submit and transact via leading portals and platforms
Review	• Conduct reviews • Set alerts for fund rebalancing and key anniversaries
Client management	• Client data is maintained in a central client bank • Request valuations and view current arrangements • Lead generation and campaigns • Manage your workload • Conduct data mining, selection and exporting • Create and assign actions • Store contact history and transactions for compliance audits • Store and view all client related documents in one place

To find out more or arrange a trial, please contact the team on 0118 903 5850 or email us at info@distribution-technology.com

We're here to help you enrich your business

[1] Source: DT Adviser Study: Increasing adviser productivity and compliance (October 2008)
[2] Source: DT Adviser Study: The value of technology (June 2010)