NaviPlan Web: Configurable solutions for your business needs

Increase ROI with a technology solution that fits your firm

Partner with EISI to tailor a solution that meets your firm's business objectives.

EISI has been developing NaviPlan financial planning software since 1990. Its solid track record of working with firms to help them identify their unique business needs and define their financial planning solutions has resulted in an established client base and sound reputation for being the vendor firms talk to about their financial planning requirements.

ISO 27001 Certified

ISO 27001

Your data is your most important asset. Nothing less than the best in data security will do.

EISI's hosted Web solutions are ISO/IEC 27001:2005 certified. The ISO/IEC 27001:2005 certification verifies that EISI has successfully implemented an Information Security Management System that provides a solid framework for initiating, implementing, maintaining, and managing information security within the organization. EISI is the first and only financial planning software developer in North America to achieve the ISO/IEC 27001:2005 certification.

NaviPlan Web configurable options

Planning tools

The industry's leading financial planning application is accessible on a convenient Web platform. A suite of tools presented in easy-to-use planning levels enable advisors to select the features that best address each client case.

Accessibility

Flexible access for the way your advisors work. NaviPlan Web can be configured to provide your advisors with service in any of three ways. In all three configurations, the user interface and calculation engine that produces the results are the same; advisors have the same user experience, so no re-training is required.

- ❑ Online – advisors access all of their planning tools and client data through NaviPlan Web via an Internet connection
- ❑ Online / Offline with Data Check-in / Check-out – advisors are free to work with and without an Internet connection
- ❑ Offline with Data Check-in / Check-out – advisors perform all of their financial planning duties on their local work-station, and then upload their new and updated client files to the centralized database

EISI will work with your firm to develop a long-term partnership strategy that results in a fully-supported configuration of NaviPlan Web. A dedicated account manager, backed by experienced training, support, and marketing resources, will collaborate with your team.

Asset allocation

Incorporate your firm's unique investment philosophy, or access tools developed by the leading authority on asset allocation to produce consistent portfolio recommendations and reduce compliance risk. The asset allocation framework in NaviPlan is very flexible and configurable to meet the specific needs of your firm.

- ❑ User-defined – your advisors create their own model portfolios and asset classes, and set the corresponding return rates for each
- ❑ Ibbotson Associates – access Ibbotson's trusted Risk Tolerance Questionnaire and Scoring Model, Model Portfolios, and Security Classifier from within NaviPlan
- ❑ Ibbotson Associates with MVO – add Ibbotson's Mean Variance Optimizer to your Ibbotson asset allocation option
- ❑ Customized – work with EISI to develop the asset allocation and investment-planning component of your NaviPlan software

Custom client reporting options

Brand your strongest sales tools. Easy-to-understand, sales-oriented client reports summarize the client's goals and ability to meet their needs, and provide the client with a clear set of action items to help your advisors shorten the sales cycle.

- ❑ Your firm logo on the cover page
- ❑ Custom text applied to:
  - ❑ Footer
  - ❑ Disclaimer page
  - ❑ Introduction page
  - ❑ Monte Carlo overview page
  - ❑ Conclusion page
  - ❑ Delivery acknowledgement
  - ❑ Section title page
  - ❑ Important Terminology page
    (Asset Classes section only; Ibbotson Asset Allocation definitions excluded)

Data import sources

Save time and reduce data-entry errors. The integration framework in NaviPlan facilitates seamless data sharing with various sources, such as portfolio management software suppliers, data consolidators, data aggregators, and your firm's various back-office systems.

- ❑ Albridge Solutions™
- ❑ More… To learn more about the third-party databases that can be accessed through NaviPlan Web, contact your NaviPlan Account Manager.

Workflow controls

Ease your compliance concerns. Control and track the flow of work within your organization and the output your advisors generate for clients. The exact workflow process is configurable to your organization's specific needs.

- ❑ Uphold your compliance standards
- ❑ Appoint plan approvers to oversee all planning activity
- ❑ Designate read, write, and control privileges
- ❑ Guide plans through your workflow process (e.g. *Draft* → *Proposed* → *Approved / Rejected*)

Entitlements and privileges

Address the unique planning needs of various individuals within your firm. Entitlements are used by administrators to grant or restrict privileges to NaviPlan software and the individual planning features.

- ❑ Financial Assessment
- ❑ Planning levels
- ❑ Modules within planning levels
- ❑ Management reports
- ❑ Calculators
- ❑ Client reports & graphs

Contact us

Work with an EISI Account Manager to fully define your firm's business requirements and develop a tailored NaviPlan Web solution.

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