

FinancialMappers® Pro

Masterclass

Sharing software with Team Members and Clients Included Client Portal Information

Please Note: Information in all Masterclass Documents is intended to assist the Financial Adviser and Paraplanners to get the maximum benefit from Financial Mappers and its many features. This information should not be considered as giving Financial Advice or advice you should pass on to your clients.

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Plencore Online Pty Ltd is a wholly owned subsidiary of Plencore Wealth Ltd and is the online retail section of the company. For additional information about the software, contact Glenis Phillips, the concept designer. (glenis.phillips@financialmappers.com.au or phone Direct Line)

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Introduction

In August 2022, the software was upgraded to create a client portal, where all information can be shared between client and adviser without using email or third party apps. This portal can only be used by advisers who have an account and clients who are either Lite Connect or Full Connect Clients. Please read the section at the end of this document – **Client Portal**.

One of the most versatile functions of *Financial Mappers* is the ability to share plans. It is important to protect each person's Intellectual Property (IP) owned when they create a plan. Access to client accounts is also discussed in that section.

From a compliance point of view, you need to identify which plans are yours. Each adviser must use their account when making a plan. In this way, you can be shown to be the owner of that IP.

There are two ways by which plans can be shared. Sometimes the software will only allow one method. The two methods are **Read** or **Read & Write**.

Where the **Read** option is selected, the person receiving the shared plan must make a copy of the plan before the plan can be opened. After making a copy, the person can edit the plan and change the name of the plan. Ownership of the IP is then transferred to the person with whom the plan is shared.

Plans shared with clients are always **Read**, which means the client must make a copy of the plan first.

Where the **Read & Write** option is used, the person with whom the plan is shared can open the plan without making a copy and edit directly into the plan. In this case, the person has been authorized to act on behalf of the owner of the plan. The most common example of this is where a **Paraplanner** is working on behalf of the adviser. In the software, all paraplanners are automatically assigned the **Read & Write** option. The adviser must remember they are responsible for the work carried out by the paraplanner and should ensure that the changes made are following instructions given to the paraplanner.

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In a multi-disciplinary practice, there may be more than one person, who provides independent services to the same client. For example, the company may have the following professionals in the practice:

- Financial Adviser
- Accountant
- Mortgage Broker
- Insurance Broker
- Real Estate Broker

All of the above will have the same role as **Adviser/Broker**. (Some will be assigned an administrative role as well). When sharing a plan with an Adviser/Broker you need to decide what level of access is appropriate. If you have a team member collaborating on the same plan, similar to the Paraplanner, then you would select the option **Read & Write**.

However, the usual method would be to share giving the **Read** option. Thus the Adviser/Broker would need to **Make a Copy** of the plan before they can access and then edit the plan.

In addition to **sharing plans**, there may be occasions where you just want to share the information in the **Starting Position**, but not a plan. Once this access is given the person can create a plan with the IP owned by that person.

Clients may have more than one service provider in the company, in which case the additional service providers must have an **Administrator** add the client to their list of clients.

The **Chief FM Admin**, and **FM Admin**, roles are in addition to the normal **Adviser/Broker** Role. A third administrator type is called **Office Admin**.

The **Office Admin** will only have access to the **User Page**, where they can add and remove clients. They can also assign clients to advisers. They do not have access to client plans.

These three roles will be referred to as **Administrators** in the document.

Shared Clients

A client is added to the system by the Adviser in their account. They click the button **+ Add Client** and complete the details. Only that adviser has access to their plans and the information they hold on the client.

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in conjunction with Good Advice

Simon Simmons

My Clients showing rows 1 to 20 of 38

+ Add Client Plans Shared with Me

Client ID First Name Surname Email Type CMS

The adviser can remove a client from their list, by clicking on the Unlink button on the Client Details Page.

Edit Client

Client ID and CMS Type

A 105-11 None Connect Client

Email (Username) Adviser(s)

battszzz@yahoo.com Adam Pitt

Required for a Connect Client

Actions

Manage Plans Send Invitation

Contact Details

Principal Partner

Firstname Surname Partner Client ID

Carl Batts Carol Batts

Initials DOB Initials DOB

Carl Caro

Personal Work

Phone Employer

Address Address

Suburb State Postcode Suburb State Postcode

Australia Australia

Unlink

Remove client from you list of clients

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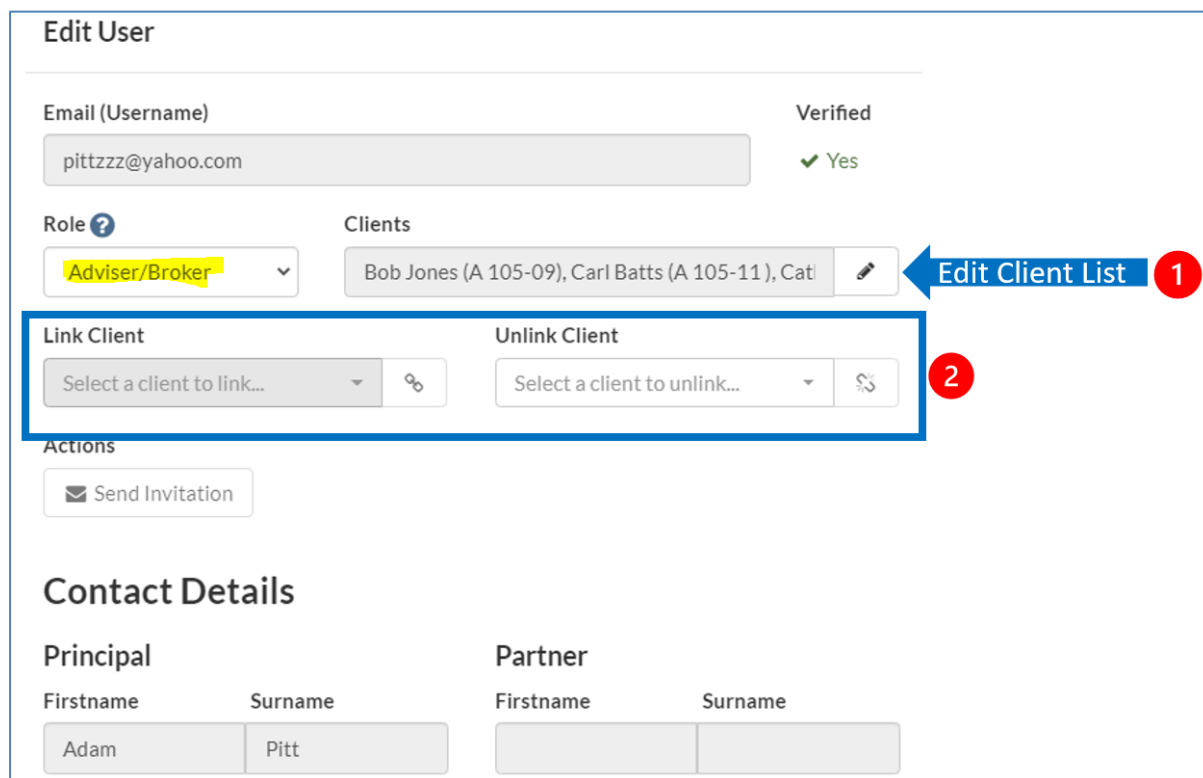
There may be times when a client has more than one adviser in the company. If this is the case, only a team member with the role of the administrator can authorize the additional Adviser/Broker to that client.

There are three levels of administrators:

- **Chief FM Admin:** In addition to accessing the USERS, they are responsible for setting Company Branding, Disclosure Statement, Default Rates, and customizing company Reports using the Report Builder. *(Adviser/Broker role included)*
- **FM Admin:** Access to the USERS page where the client and team members are managed. *(Adviser/Broker role included)*
- **Admin Office:** Access to the USERS page where the client and team members are managed. *(Adviser/Broker role is **NOT** included)*

Note that once an adviser has a client assigned to an adviser, they can also access the **Client Details** from their **Client List**. They will not have access to the User Page.

Administrators can add and remove clients from an adviser's list of clients on the **Users** Page.



Edit User

Email (Username) Verified
pittzzz@yahoo.com ✓ Yes

Role ? Adviser/Broker ▼ Clients
Bob Jones (A 105-09), Carl Batts (A 105-11), Cat ✎ ← Edit Client List 1

Link Client **Unlink Client**

Select a client to link... 🔗 2 Select a client to unlink... 🔗

Actions
✉ Send Invitation

Contact Details

Principal **Partner**

Firstname Surname Firstname Surname

Adam Pitt

Administrator Adding a Client to an Adviser List

The administrator selects the adviser, Adam Pitt, and clicks on the **EDIT** icon next to Clients.

Edit User

Email (Username): pttzzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Actions: Send Invitation

Contact Details

Principal		Partner	
Firstname	Surname	Firstname	Surname
Adam	Pitt		

To add a **Client**, click on the drop-down list for **Link Client** and start to type the Name or Client ID into the filter

Edit User

Email (Username): pttzzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Link Client: Select a client to link... Unlink Client: Select a client to unlink...

Filter: Paul Harry, Ted Lawrence (105-bde), James West (A 102-21), Mary Adams (A 105-10), Beth Carley (A 105-13)

Filter: good

Tom Goodman (C 102-60)

John Gooding (XX 555 607)

Once the name of the client has been selected, click on the **LINK** icon to the right of the name and the client will be added to the adviser's list of clients.

Edit User

Email (Username): pttzzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Link Client: Tom Goodman (C 102-60) Unlink Client: Select a client to unlink...

Administrator Removing a Client to an Adviser List

The administrator selects the adviser, Adam Pitt, and clicks on the **EDIT** icon next to **Clients**.

Edit User

Email (Username): pittzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Actions: Send Invitation

Contact Details

Principal		Partner	
Firstname	Surname	Firstname	Surname
Adam	Pitt		

The administrator clicks on the drop-down list to reveal the filter and list of client names.

Edit User

Email (Username): pittzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Link Client: Select a client to link...

Unlink Client: Select a client to unlink...

Unlink Client

Select a client to unlink...

Filter: carl

Carl Batts (A 105-11)

Beth Carley (A 105-13)

Cath Carmell (A 105-14)

Once the client's name has been selected, click on the **LINK** icon to remove the client from the adviser's list. The Client's name will remain on the User Page.

Edit User

Email (Username): pittzz@yahoo.com Verified: Yes

Role: Adviser/Broker

Clients: John Gooding (555 607), Bob Jones (A 105-09), C

Link Client: Select a client to link...

Unlink Client: Beth Carley (A 105-13)

Administrator Adding a New Client to the User Page

The administration selects **Add User**. One of the three client roles will be selected, in this case, **Client**. In the box **Advisers**, click on the **EDIT** icon to reveal the options of **Linking or Unlinking an Adviser**.

The screenshot shows the 'Add User' form. The 'Email' field contains 'wendy.jonas@gmailzz.com' and is marked as 'Verified' with a red 'x' and 'No'. The 'Role' dropdown is set to 'Client'. The 'Advisers' dropdown is set to '(None)' and has an 'EDIT' icon next to it, which is highlighted with a red circle and a blue arrow pointing to it with the text 'Edit Adviser List' and a red circle with the number '1'. Below the 'Advisers' dropdown, there are two sections: 'Link Adviser' and 'Unlink Adviser'. The 'Link Adviser' section has a dropdown menu with the text 'Select an adviser to link...' and a link icon, which is highlighted with a red circle and the number '2'. The 'Unlink Adviser' section has a dropdown menu with the text 'Select an adviser to unlink...' and an unlink icon. At the bottom, there are fields for 'Client ID and CMS' (set to 'A 120 -45') and 'Partner Client ID' (set to 'A 120-45').

Use the filter to select adviser, Adam Pitt

The first screenshot shows the 'Add User' form with the 'Link Adviser' dropdown menu open. A filter box is visible above a list of advisers: Bill Allgood, Ben Cantrell, Wendy Carr, Adam Pitt, and Simon Simmons. The second screenshot shows the same form, but the 'Link Adviser' dropdown menu is now closed, and 'Adam Pitt' is selected in the dropdown. A blue box highlights the 'Adam Pitt' selection.

Click on the **LINK** icon to add Adam Pitt as the adviser for this new client.

The screenshot shows the 'Add User' form with 'Adam Pitt' selected in the 'Link Adviser' dropdown. A blue arrow points to the link icon next to the dropdown menu.

Adding and Removing Clients through the Client's Page

The same process can be performed from the Client's account. Here, adviser, Adam Pitt is added to Bob Potts' account.

The screenshot shows the 'Edit User' form for a client named Bob Potts. The form includes fields for Email (Username), Role, and Advisers. The Email field is 'pottszzz@yahoo.com' and is marked as 'Verified' with a green checkmark and 'Yes'. The Role is set to 'Connect Client'. The Advisers list currently contains 'Simon Simmons'. Below the Advisers list, there is a 'Link Adviser' section with a dropdown menu showing 'Adam Pitt' and a link icon. A blue arrow points to the link icon. To the right of the 'Link Adviser' section is an 'Unlink Adviser' section with a dropdown menu showing 'Select an adviser to unlink...' and an unlink icon.

Here, adviser, Ben Cantrell is to be removed from Carl Batts' account.

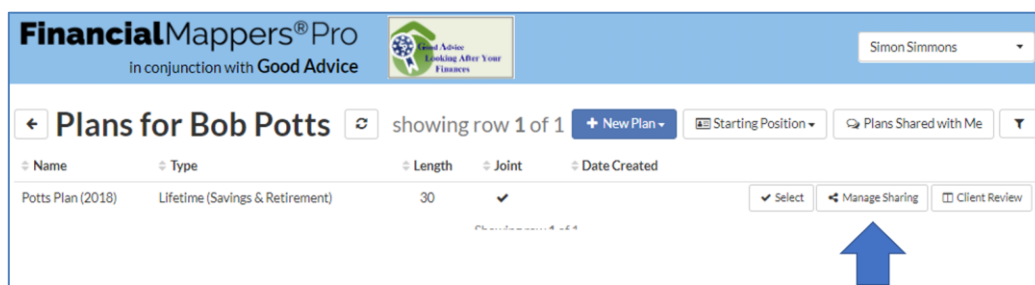
The screenshot shows the 'Edit User' form for a client named Carl Batts. The form includes fields for Email (Username), Role, Advisers, Link Adviser, Unlink Adviser, Client ID and CMS, Partner Client ID, and Actions. The Email field is 'battszzz@yahoo.com' and is marked as 'Verified' with a green checkmark and 'Yes'. The Role is set to 'Connect Client'. The Advisers list currently contains 'Ben Cantrell, Adam Pitt'. Below the Advisers list, there is a 'Link Adviser' section with a dropdown menu showing 'Select an adviser to link...' and a link icon. To the right of the 'Link Adviser' section is an 'Unlink Adviser' section with a dropdown menu showing 'Ben Cantrell' and an unlink icon. A blue arrow points to the unlink icon. Below the 'Unlink Adviser' section is a 'Client ID and CMS' section with a dropdown menu showing 'A 105-11' and a 'None' option. To the right of the 'Client ID and CMS' section is a 'Partner Client ID' field. Below the 'Partner Client ID' field is a 'Contact Details' section with a table for Principal and Partner information. The Principal table has columns for Firstname and Surname, with values 'Carl' and 'Batts'. The Partner table has columns for Firstname and Surname, with values 'Carol' and 'Batts'. A blue arrow points to the 'Partner Client ID' field.

Plan Sharing between Adviser and Paraplanner

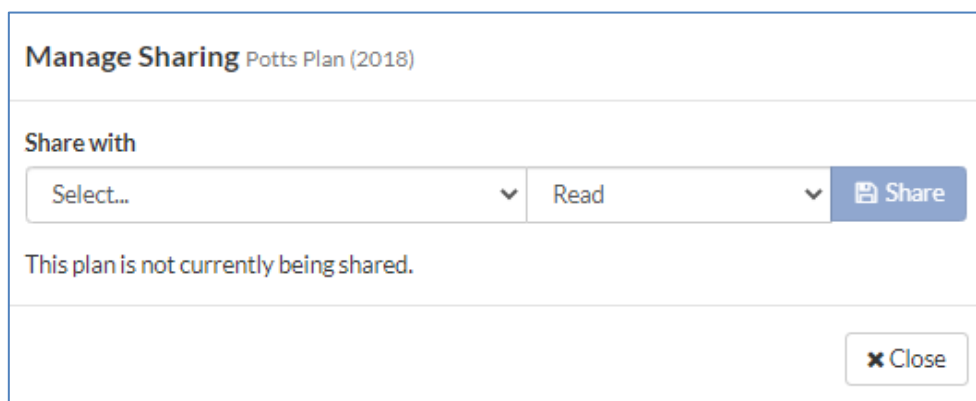
When an Adviser wishes a Paraplanner to work on a plan, the Adviser needs to start the plan, if only just giving the plan a name. The second option is to share the **Starting Position**, in which case the paraplanner can initiate the plan, but the plan would have to be shared back to the adviser, and hence a copy of the plan made.

Sharing Plans

In this example, adviser Simon Simmons wants to share Potts Plan (2018) with the paraplanner Wendy Carr. The adviser selects the **Manage Sharing** button, to the right of the plan.

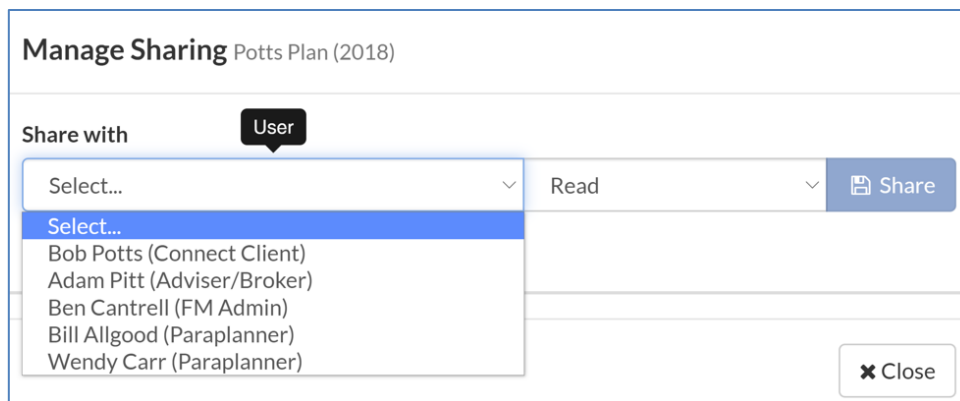


The dialogue box is empty. (Note that the client's plan is currently not being shared with anyone).



The drop-down list will display the name of the client, together with all adviser/brokers and paraplanners.

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Manage Sharing Potts Plan (2018)

Share with User

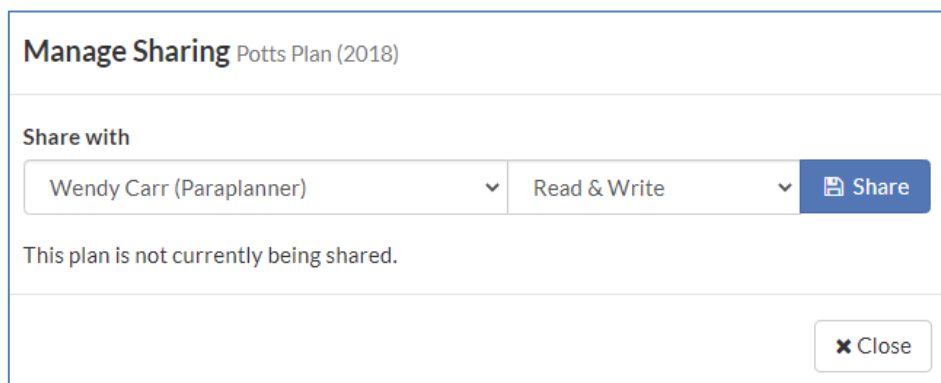
Select... Read  Share

Select...

- Bob Potts (Connect Client)
- Adam Pitt (Adviser/Broker)
- Ben Cantrell (FM Admin)
- Bill Allgood (Paraplanner)
- Wendy Carr (Paraplanner)

 Close

When Wendy Carr (Paraplanner) has been selected, the only **share option** is **Read & Write**.



Manage Sharing Potts Plan (2018)

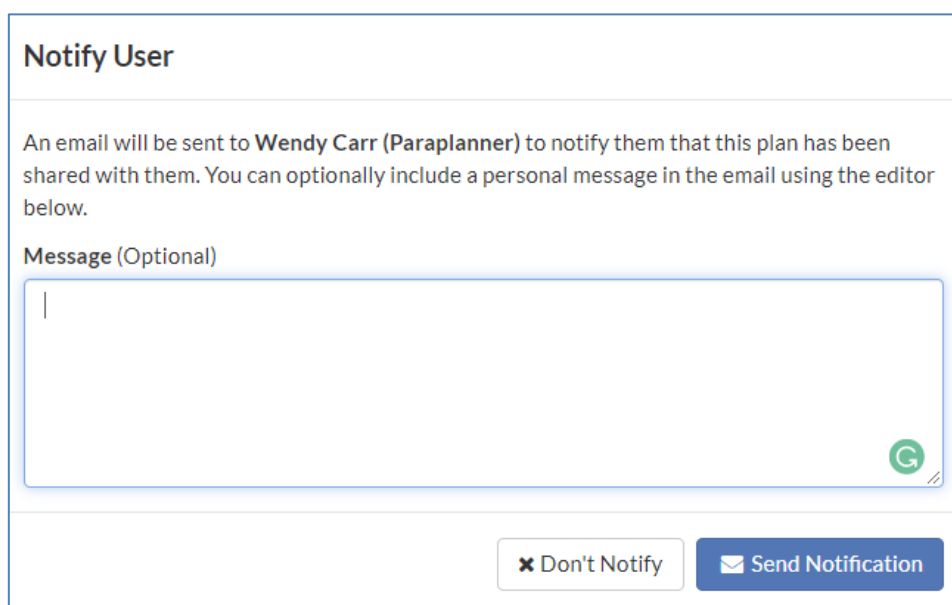
Share with

Wendy Carr (Paraplanner) Read & Write  Share

This plan is not currently being shared.

 Close

Once the **Share** button is clicked, an optional message can be sent via email.



Notify User

An email will be sent to **Wendy Carr (Paraplanner)** to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

Message (Optional)



 Don't Notify  Send Notification

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Wendy Carr is now listed as having access to the plan, with the **Read & Write** option. To stop sharing, the adviser simply presses the **Red** icon. The **Envelope** icon allows an adviser to send a message.

User	Access
Wendy Carr (Paraplanner)	Read & Write

Wendy Carr logs into the software where she lands on the **My Clients** page. Note that the paraplanner has no clients. This will be discussed shortly. Wendy must click on the button **Plans Shared with Me**.

Note that Wendy just has to click on the name of the plan, to access the plan. She does not have to make a copy and is, therefore, acting on behalf of the adviser.

Plan	User	Shared By	Type	Date Shared
Potts Plan (2018)	Bob Potts	Simon Simmons	Lifetime (Savings & Retirement)	3/11/2021

When Wendy has completed her task, she does not have to share the plan back to the adviser, however, she should send a message, outside Financial Mappers to say she has completed her task.

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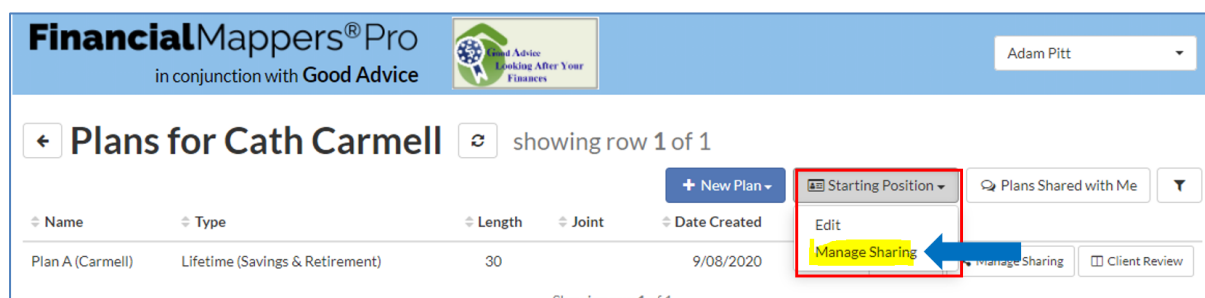
NOTE: It is recommended that as the personal with whom the plan has been shared, should **DELETE** the sharing, once the task has been completed. To do this click on the **RED ICON**. This ensures the list is not cluttered with old plans that have been shared. The Paraplanner can immediately see when the *Plan* or *Starting Position* was shared and proceed with their work in an orderly fashion.

Sharing Starting Position

The second option for the adviser is to share the **Starting Position**.

Note that any **Connect Client** has automatic access to the **Starting Position** and this cannot be removed. Either party with access to the client's plans can change the information in the Starting Position. (The software will identify who last updated the information.

To share the Starting Position, the option, **Manage Sharing**, from the drop-down list under **Starting Position**.



The screenshot shows the Financial Mappers Pro interface. At the top, there's a header with the logo and user name 'Adam Pitt'. Below that, a section titled 'Plans for Cath Carmell' shows a table with one row: 'Plan A (Carmell)' with type 'Lifetime (Savings & Retirement)', length '30', and date '9/08/2020'. To the right of the table, there's a 'Starting Position' dropdown menu. A red box highlights this menu, and a blue arrow points to the 'Manage Sharing' option within it. Other options visible are 'Edit' and 'Plans Shared with Me'.

The client Cath Carmell is a Connect Client and therefore has access to the Starting Position. The same applies to the client's adviser, Adam Pitt. Both have **Read & Write** access to the **Starting Position**. This means that either the client or the adviser can edit the Starting Position. Wendy Carr will now be added to the list, however, the adviser can choose to Stop Sharing with the Paraplanner, but not the Client.

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Manage Sharing Starting Position

Share with

Wendy Carr (Paraplanner) ▼

Read & Write ▼

Share

This plan is being shared with the following users:

User	Access	
Adam Pitt (Adviser/Broker)	Read & Write	 

Close

Note that *Adam Pitt*, delete button is greyed out as he always has access to the Starting Position of his clients.

Whenever a sharing option is selected, there is an option to send a notification via email.

Notify User

An email will be sent to **Wendy Carr (Paraplanner)** to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

Message (Optional)

Don't Notify

Send Notification

Wendy Carr, Paraplanner, must now log into the software and go to **Plans Shared with Me**.

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Wendy Carr ▼

My Clients ↻

Plans Shared with Me ▼

No clients

← **Plans Shared with Me** ↻ showing rows 1 to 2 of 2 ▼

Below is a list of Plans that have been shared with you.

Plan	User	Shared By	Type	Date Shared	
Potts Plan (2018)	Bob Potts	Simon Simmons	Lifetime (Savings & Retirement)	3/11/2021	✓ Select  
Starting Position	Cath Carmell	Adam Pitt		3/11/2021	✓ Select 

Showing rows 1 to 2 of 2

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Wendy now has full access to all the features of the **Starting Position**. That is she can enter information for:

- **Starting Position** financials which are imported into plans
- **About Me and My Family**, if the adviser wants this completed from a Fact Find, however, this would be unusual.
- **Wealth Tracker**, if the adviser wants the Actuals for the year to be completed.

The screenshot shows the 'Starting Position' screen for Cath Carmell. At the top, there are navigation buttons: 'Back', 'Starting Position' (active), 'About Me & My Family', 'Wealth Tracker', 'Import CSV', and 'Export CSV'. Below this is a section titled 'STARTING POSITION OPTIONS' with a 'Reset Starting Position' button. Underneath, there are two tabs: 'Single Plan' (selected) and 'Joint Plan'. Below the tabs are two sections: 'SALARY' and 'PERSONAL ASSETS'. Each section has a '+' button to add new entries and 'Save' and 'Cancel' buttons. The 'SALARY' section has a 'Save' button and a 'Cancel' button. The 'PERSONAL ASSETS' section has a 'Save' button and a 'Cancel' button.

In this case, Wendy is going to complete the Starting Position information, by either importing using a CSV file or manually entering the data. Manual entry should only take five to 10 minutes if all the information is in one central place.

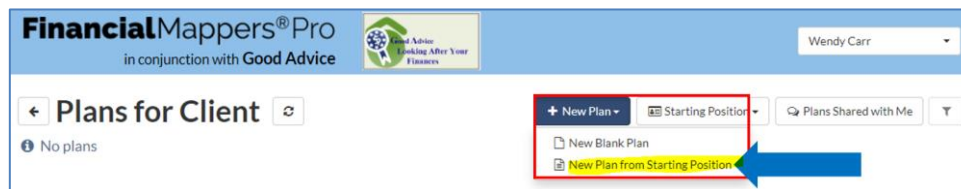
The screenshot shows the 'Starting Position' screen for Cath Carmell, now with data entered. At the top, there are navigation buttons: 'Back', 'Starting Position' (active), 'About Me & My Family', 'Adviser Notes', 'Wealth Tracker', 'Import CSV', 'Export CSV', and 'Continue to My Plans'. Below this is a section titled 'STARTING POSITION OPTIONS' with a 'Reset Starting Position' button. Underneath, there are two tabs: 'Single Plan' (selected) and 'Joint Plan'. Below the tabs are two sections: 'SALARY' and 'PERSONAL ASSETS'. Each section has a '+' button to add new entries and 'Save' and 'Cancel' buttons. The 'SALARY' section has a table with columns: Description, Owner, Annual Amount, and No. of Years. The 'PERSONAL ASSETS' section has a table with columns: Description, Owner, Type, and Current Value.

Description	Owner	Annual Amount	No. of Years
Salary A	Cath	\$160,000	50 Years
Salary B	David	\$140,000	50 Years

Description	Owner	Type	Current Value
Car B	David	Vehicle	\$15,000
Car A	Cath	Vehicle	\$20,000
Caravan	Joint	Other	\$40,000
Furniture & Fittings	Joint	Vehicle	\$15,000

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At this point, Wendy could exit the client's information, and leave it ready for the adviser to commence the plan. Alternately she could commence the plan. In this case, she would select the option to commence the plan.



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Wendy Carr

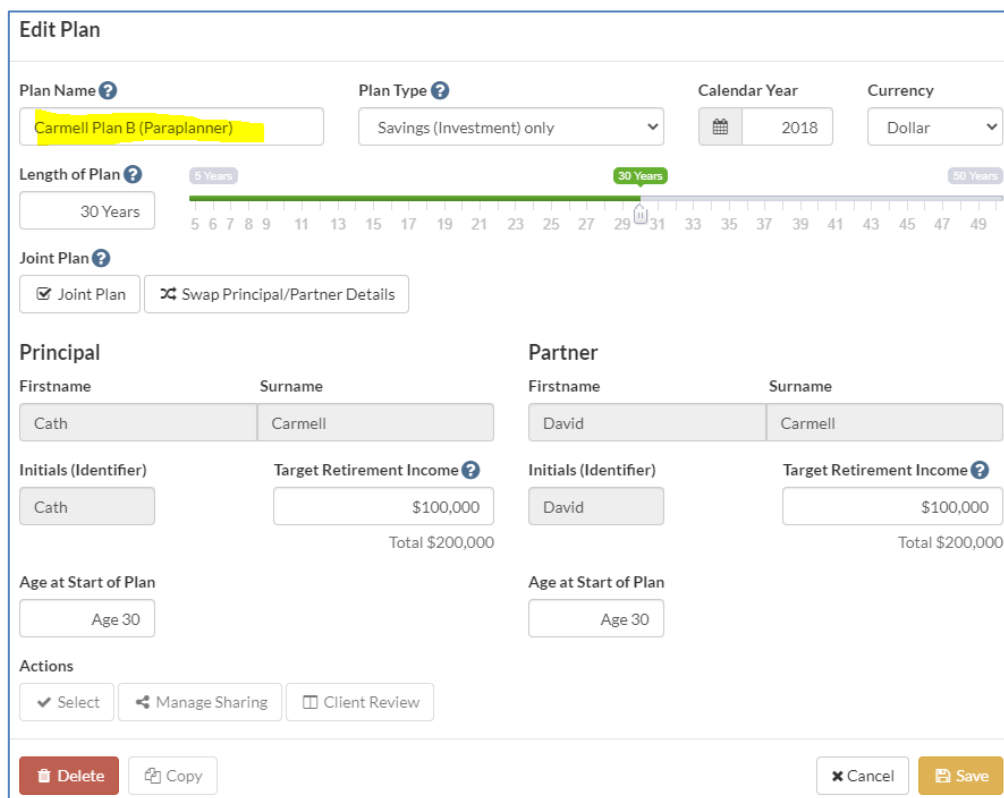
Plans for Client

No plans

+ New Plan + Starting Position Plans Shared with Me

New Blank Plan
New Plan from Starting Position

Wendy must **Edit** the plan. Note the plan must be given a name, and I have suggested that she identify this plan as one created by her. The reason is that the IP of this plan is assigned to Wendy Carr. She will later need to share this plan back to the adviser who must make a copy and identify the plan as his.



Edit Plan

Plan Name ? Carmell Plan B (Paraplanner)

Plan Type ? Savings (Investment) only

Calendar Year 2018

Currency Dollar

Length of Plan ? 30 Years

Joint Plan ? ☒ Joint Plan ☐ Swap Principal/Partner Details

Principal

Firstname Surname Cath Carmell

Initials (Identifier) Target Retirement Income ? Cath \$100,000

Partner

Firstname Surname David Carmell

Initials (Identifier) Target Retirement Income ? David \$100,000

Age at Start of Plan Age 30

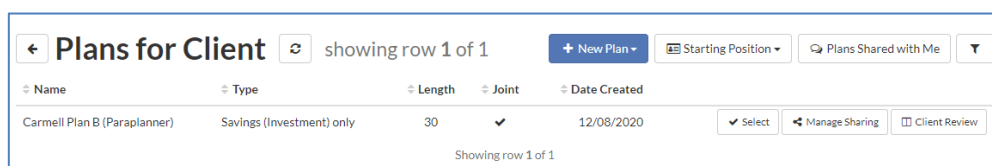
Age at Start of Plan Age 30

Actions

☒ Select ☐ Manage Sharing ☐ Client Review

Delete Copy Cancel Save

Note that this plan is now listed in the Plans for the Client.



Plans for Client showing row 1 of 1

+ New Plan + Starting Position Plans Shared with Me

Name	Type	Length	Joint	Date Created	Actions
Carmell Plan B (Paraplanner)	Savings (Investment) only	30	☒	12/08/2020	☒ Select ☐ Manage Sharing ☐ Client Review

Showing row 1 of 1

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Wendy can now complete the plan, including any information which may be required for the Statement of Advice on the SOA chevron.

When completed, Wendy must share this plan with the adviser, Adam Pitt by clicking the **Manage Sharing** Button. Note that the access option is **Read**.

Manage Sharing Carmell Plan B (Paraplanner)

Share with **User**

Adam Pitt (Adviser/Broker) ▼ **Read** ▼ **Share**

This plan is not currently being shared.

Close

A message can be then sent to the adviser.

Notify User

An email will be sent to **Adam Pitt (Adviser/Broker)** to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

Message (Optional)

Don't Notify **Send Notification**

Note that after the paraplanner has completed the work and the adviser has made a copy of this plan, the paraplanner's copy could be deleted to keep lists simple. However, the paraplanner may want to keep a record of their plans created.

Adam Pitt logs into the software and selects **Plans Shared with Me**.

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← Plans Shared with Me ↻ showing row 1 of 1					⌵
Below is a list of Plans that have been shared with you.					
Plan	User	Shared By	Type	Date Shared	
Carmell Plan B (Paraplanner)	Cath Carmell	Wendy Carr	Savings (Investment) only	3/11/2021	Copy 
Showing row 1 of 1					

The adviser must make a copy of the plan so that the IP transfers from Wendy Carr to Adam Pitt. It is recommended that once a **COPY** of the plan has been created, the **RED ICON** is used to stop the sharing. The intention is for the list of **Plans Shared with Me** to be maintained as a list of work in progress.

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Plans Shared with Me					showing row 1 of 1
Below is a list of Plans that have been shared with you.					
Plan	User	Shared By	Type	Date Shared	
Carmell Plan B (Paraplanner)	Cath Carmell	Wendy Carr	Savings (Investment) only	3/11/2021	Copy Close
Showing row 1 of 1					

When Adam, selects COPY, it will double-check the plan is being assigned to the correct client. *(Always check the information is correct)*

Choose Client ✕

Choose a client to link the copied plan to:

Cath Carmell

▼

Copy

Cancel

The plan will open with the words Copy of "Plan Name".

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Adam Pitt

My Plans

Copy of Carmell Plan B (Paraplanner)
Cath Carmell, David Carmell

Modelling Tools are off

Objectives Targets Planner Review Reports SOA Client Review

Personal Cash Flow
Salary and Other Income
Pensions from External Sources
Personal Loans Credit Cards
Insurances
Lifestyle Goals
Retirement Income

Investment Assets/Loans
Salary Allocation to Investing
Salary Allocation Investment Plan
Transaction Account
Cash Accounts
Term Deposits
Bonds
Shares
Managed Funds
Superannuation/Pension Fund
Self Managed Superannuation/Pension Fund (SMSF)
Annuities or Defined Benefit Pension Fund
Real Estate
Your Homes
All Investment Loans

Calcs & Settings
Legend
Handy Quick Calcs
Plan Default Rates
Tax Schedule
Excel Tools

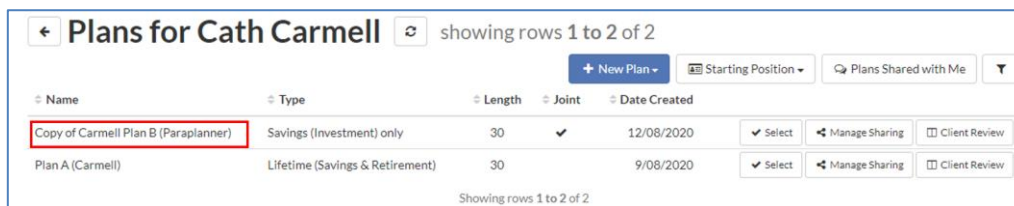
Version: 3.64.0

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The IP of this copy now belongs to Adam Pitt. It is recommended that the name of the be changed.

Financial Mappers Pro Masterclass

Click on **My Plans**, top left-hand corner, and click on the name of the plan.

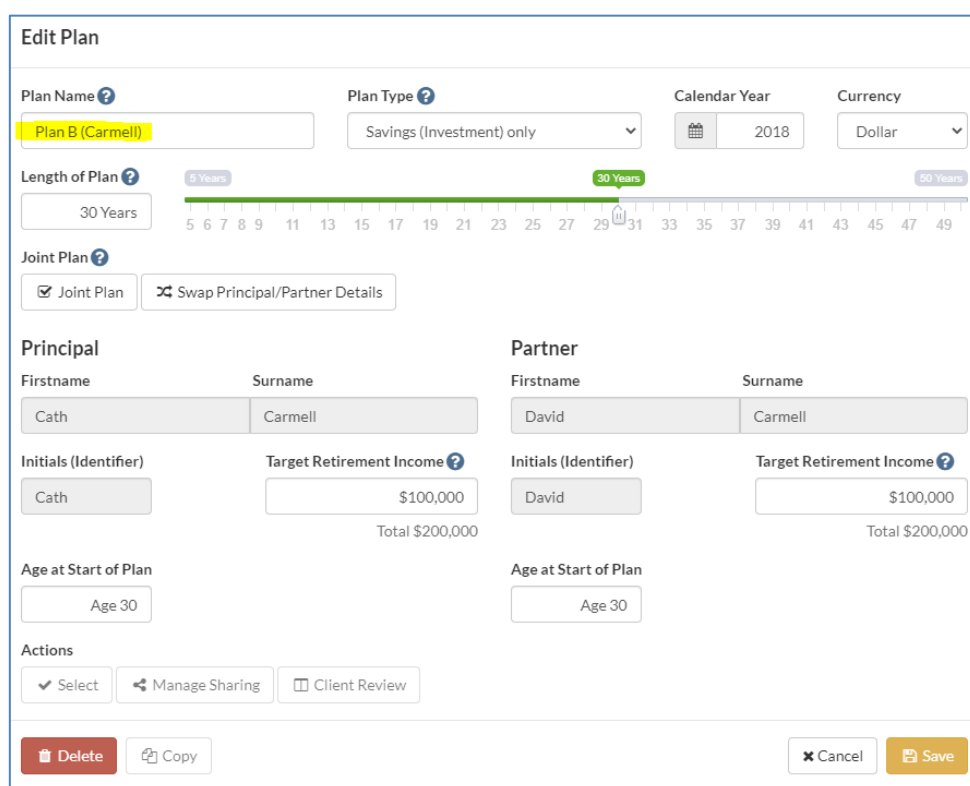


The screenshot shows a web interface titled "Plans for Cath Carmell" with a subtitle "showing rows 1 to 2 of 2". Below the title are several filters: "+ New Plan", "Starting Position", and "Plans Shared with Me". A table lists two plans:

Name	Type	Length	Joint	Date Created	Actions
Copy of Carmell Plan B (Paraplanner)	Savings (Investment) only	30	✓	12/08/2020	Select, Manage Sharing, Client Review
Plan A (Carmell)	Lifetime (Savings & Retirement)	30		9/08/2020	Select, Manage Sharing, Client Review

At the bottom, it says "Showing rows 1 to 2 of 2".

This will take you to the **Edit Plan** screen, where the name could be changed to, say, **Plan B (Carmell)**, in line with the adviser's naming system.



The screenshot shows the "Edit Plan" screen for "Plan B (Carmell)". The form includes the following fields and options:

- Plan Name:** Plan B (Carmell)
- Plan Type:** Savings (Investment) only
- Calendar Year:** 2018
- Currency:** Dollar
- Length of Plan:** 30 Years (with a slider from 5 to 50 years)
- Joint Plan:** ☒ Joint Plan, ☐ Swap Principal/Partner Details
- Principal:**
 - Firstname: Cath, Surname: Carmell
 - Initials (Identifier): Cath
 - Target Retirement Income: \$100,000 (Total \$200,000)
 - Age at Start of Plan: Age 30
- Partner:**
 - Firstname: David, Surname: Carmell
 - Initials (Identifier): David
 - Target Retirement Income: \$100,000 (Total \$200,000)
 - Age at Start of Plan: Age 30
- Actions:** Select, Manage Sharing, Client Review
- Buttons:** Delete, Copy, Cancel, Save

Plan Sharing between Advisers

With team members holding the role **Adviser/Broker**, there are two options and you need to carefully consider which level of access you will provide. Apart from that, the process is the same as in the section for Advisers and Paraplanners, except paraplanners always have access to **Read & Write**.)

- **Read**: Requires the adviser to make a copy, transferring the IP of the Copied Plan only to the second adviser. Here the second adviser can edit the plan, rename the plan, and claim the plan as theirs. Normally this is the access recommended because you are no longer responsible for any changes made to the copied plan.
- **Read & Write**: This option should only be used where you are collaborating with a colleague on a specific plan. The second adviser is given the right to directly EDIT into your plan, but the IP of the plan remains yours. Thus, it is really important that after the second adviser has completed their edits, the work is reviewed by yourself to ensure you agree with the changes.

The adviser can also share the **Starting Position**, in the same manner as the Paraplanner.

Sharing Plans

Adviser Simon Simmons wants to share client Bob Potts' plan **Potts Plan (2018)** with adviser Adam Pitt.

Simon does not want Adam editing his plan, so he selects the option **Read**, which is the default selection. Note that Wendy Carr, Paraplanner, is still listed as having **Read & Write Access**. (That sharing can be stopped after the Paraplanner has completed their work)

Financial Mappers Pro Masterclass

Manage Sharing Potts Plan (2018)

Share with

Adam Pitt (Adviser/Broker) ▼ Read ▼  Share

This plan is being shared with the following users:

User	Access
Wendy Carr (Paraplanner)	Read & Write  

 Close

Once the **Share** button is clicked, the adviser can be sent a message via email.

Notify User

An email will be sent to Adam Pitt (Adviser/Broker) to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

Message (Optional)



 Don't Notify  Send Notification

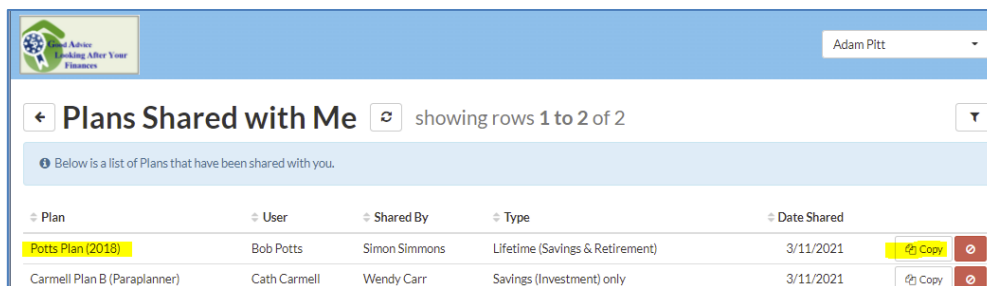
Adam Pitt, adviser, log into the software, and on the **My Clients** page, selects **Plans Shared with Me**.

FinancialMappers® Pro in conjunction with **Good Advice**  Adam Pitt ▼

My Clients  showing rows 1 to 13 of 13   Plans Shared with Me ▼

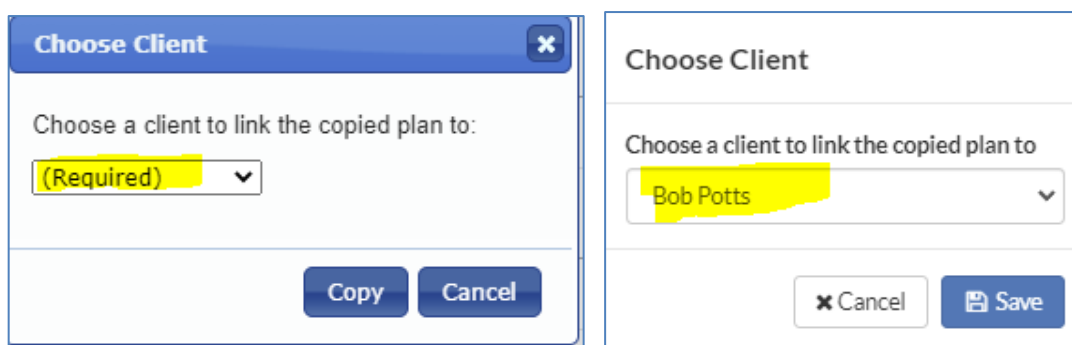
Client ID	First Name	Surname	Email	Type	CMS
A 105-11	Carl	Batts	battszzz@yahoo.com	Connect Client	
A 105-26	Jim	Cannon	cannon1zzz@aol.com	Connect Client	
A 105-13	Beth	Carley	carleyzzz@outlook.com	Connect Client	
A 105-14	Cath	Carmell	carmellzzz@aol.com	Connect Client	

Financial Mappers Pro Masterclass



Plan	User	Shared By	Type	Date Shared	
Potts Plan (2018)	Bob Potts	Simon Simmons	Lifetime (Savings & Retirement)	3/11/2021	
Carmell Plan B (Paraplanner)	Cath Carmell	Wendy Carr	Savings (Investment) only	3/11/2021	

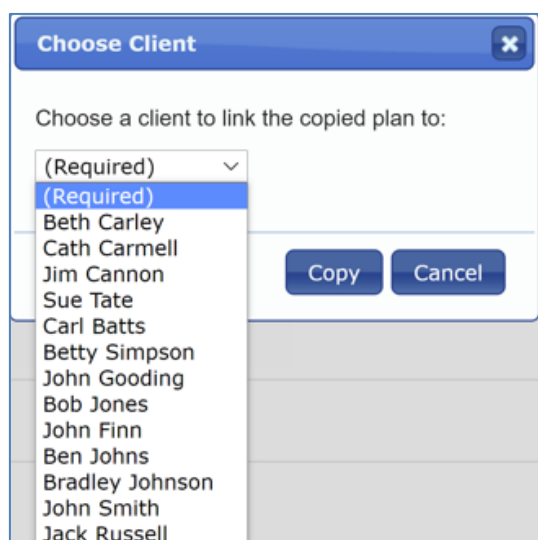
Note that when you select the Copy icon, sometimes, as in this case, you will be asked to select the client, while at other times the client is already selected.



Choose Client
Choose a client to link the copied plan to:
(Required)

Choose Client
Choose a client to link the copied plan to:
Bob Potts

In this example, Bob Potts is not listed as a client of Adam Pitt and therefore his name is not listed.



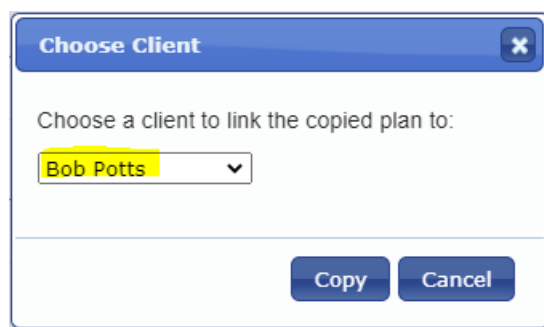
Choose Client
Choose a client to link the copied plan to:
(Required)
Beth Carley
Cath Carmell
Jim Cannon
Sue Tate
Carl Batts
Betty Simpson
John Gooding
Bob Jones
John Finn
Ben Johns
Bradley Johnson
John Smith
Jack Russell

If the Client has not previously been assigned to another adviser, then permission must be sought from an administrator to add the client. This action will be performed by the

Financial Mappers Pro Masterclass

administrator and not the adviser. In this case, the adviser is assigned to the client and the adviser now has access to Bob Potts, as he has been added to the **Client List** for that adviser.

After the client, Bob Potts has been added to the adviser's list of clients, he can copy the plan.



Once the copy has been made Adam Pitt, adviser, can **EDIT** the plan and make changes. The IP has now been transferred from adviser Simon Simmons to adviser Adam Pitt.



In this example, adviser Simon Simons is inviting adviser and administrator, Ben Cantrell to assist in developing the plan on behalf of Simon Simmons. That is, he is acting in the same manner as a paraplanner. Therefore, Ben Cantrell is given the access option **Read & Write**. (Note that Bob Potts is not a client of Ben Cantrell)

Financial Mappers Pro Masterclass

Manage Sharing Potts Plan (2018)

Share with

Ben Cantrell (FM Admin)

Read & Write

Share

This plan is being shared with the following users:

User	Access
Adam Pitt (Adviser/Broker)	Read
Wendy Carr (Paraplanner)	Read & Write

Close

An email can be sent after the **Share** button is clicked.

Notify User

An email will be sent to **Ben Cantrell (FM Admin)** to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

Message (Optional)

Don't Notify

Send Notification

Ben Cantrell will log into the software, and go to **Plans Shared with Me**.

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in conjunction with **Good Advice**

Ben Cantrell

My Clients showing rows 1 to 4 of 4

+ Add Client

Plans Shared with Me

Client ID	First Name	Surname	Email	Type	CMS
C 106-25	John	Citizen		Client	Plans
A 105-16	Beth	Vann	vann2zzz@aol.com	Connect Client	Plans
A 105-18	Carol	Vinny	vinnyzzz@outlook.com	Connect Client	Plans
A 102-21	James	West		Client	Plans

Financial Mappers Pro Masterclass

Ben Cantrell can now access the plan and edit directly into the plan. Note that while a copy of the plan could be made, but as this client does not belong to the adviser, the copy cannot be made.

Plan	User	Shared By	Type	Date Shared	
Potts Plan (2018)	Bob Potts	Simon Simmons	Lifetime (Savings & Retirement)	3/11/2021	✓ Select Copy [Red Stop Sharing Icon]

Ben Cantrell can use the “Stop Sharing” (RED ICON), when he no longer requires access. So, if we look at the **Manage Sharing** for the Potts Plan (2018), three people have access to the plan. The adviser can **Stop Sharing at** any time, by clicking on the **Red** button.

User	Access	
Adam Pitt (Adviser/Broker)	Read	[Email Icon] [Red Stop Sharing Icon]
Ben Cantrell (FM Admin)	Read & Write	[Email Icon] [Red Stop Sharing Icon]
Wendy Carr (Paraplanner)	Read & Write	[Email Icon] [Red Stop Sharing Icon]

Sharing Starting Position

The same rules will apply as described in the Paraplanner section. That is the Starting Position is always a **Read & Write** access. However, Adam Pitt cannot make plans for the client, as is the case for the Paraplanner.

Adviser, Simon Simmons wants to share the **Starting Position** of (Lite) Connect Client, Jack Sims with adviser Adam Pitt.

Manage Sharing

Starting Position

Share with

Adam Pitt (Adviser/Broker)

Read & Write

Share

This plan is being shared with the following users:

User	Access	
Simon Simmons (Chief FM Admin)	Read & Write	

Close

A message is sent to Adam Pitt.

Notify User

An email will be sent to Adam Pitt (Adviser/Broker) to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.

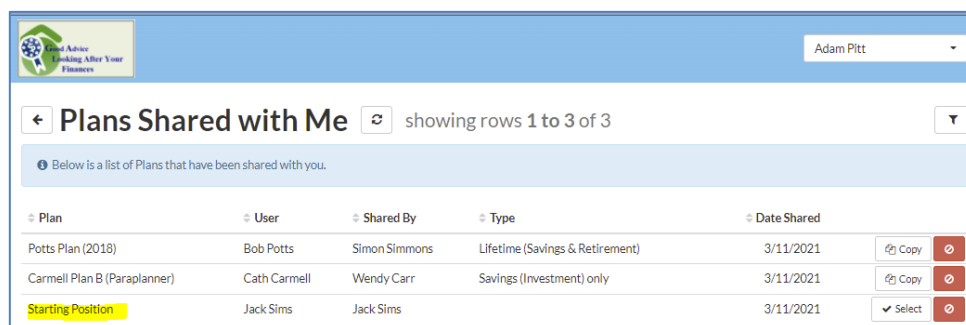
Message (Optional)

Don't Notify

Send Notification

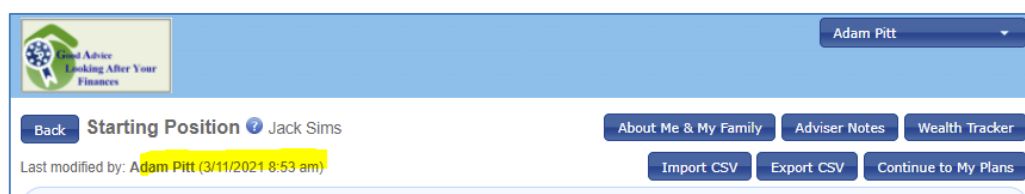
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Adam Pitt logs into the software and goes to **Plans Share with Me**. From here he has access to the Starting Position of Jack Sims.



Plan	User	Shared By	Type	Date Shared		
Potts Plan (2018)	Bob Potts	Simon Simmons	Lifetime (Savings & Retirement)	3/11/2021	Copy	X
Carmell Plan B (Paraplanner)	Cath Carmell	Wendy Carr	Savings (Investment) only	3/11/2021	Copy	X
Starting Position	Jack Sims	Jack Sims		3/11/2021	Select	X

Adam now has direct access to the **Starting Position** of Jack Sims, where he can **EDIT** the information. When this occurs Adam Pitt is shown as the last person to update the Starting Position.



Back Starting Position Jack Sims

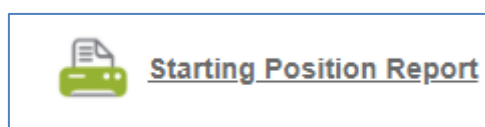
Last modified by: Adam Pitt (3/11/2021 8:53 am)

About Me & My Family Adviser Notes Wealth Tracker

Import CSV Export CSV Continue to My Plans

Adam Pitt cannot make plans for this client. He can complete the following:

- Edit the Starting Position
- Edit the About Me and My Family
- Edit the Wealth Tracker
- Import and Export CSV files
- Generate the Starting Position Report



Access to the Starting Position Report may be important for a Mortgage Broker.

Where an adviser needs to make a plan for the client, then they should seek permission from the administrator to be added to the client's list of advisers.

Sharing Plans between Adviser and Client

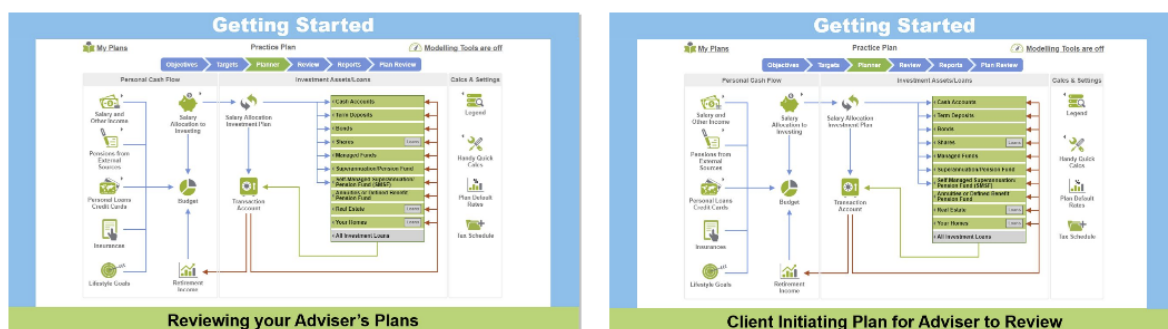
Sharing plans with **Connect Clients** can be of two types.

- The adviser creates a plan and shares either the first 5-years or the total plan with the client, depending on whether the client is a **Lite Connect Client** or a **Connect Client**.
- The **Connect** or **Lite Connect Client** creates a plan and then shares the plan with the Adviser.

Where an adviser elects to share a plan with a **Lite Connect Client**, only the first 5-years of the plan is displayed. For most clients, looking at the first 5-years is likely all they need to see.

With **Connect Clients**, you can share the full length of the plan. However, if you only want your client to see a shorter version, you can go to **Edit Plan** and change the length of the plan while you are sharing. Later you can change then the length of the plan.

Two short videos show the difference in the **Financial Mappers Pro QuickStart Resources** / **ProCONNECT Client Resources**:



Connect Clients will have links in their version of the software to these videos, together with other supplementary videos such as *Sample Plans* and *Financial Concepts*.

Sharing Plan with Client

Adviser Simon Simmons wants to share the plan **Potts Plan (2018)** with the client Bob Potts. Note that Simon Simmons is already sharing the plan with advisers Adam Pitt and Ben Cantrell, together with Paraplanner, Wendy Carr. Note that the only option is the **Read**

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option. This means that Connect Clients must always make a copy of the plan before they can edit it. This then transfers the IP to the client.

The screenshot shows a 'Manage Sharing' window for a plan titled 'Potts Plan (2018)'. At the top, there is a 'Share with' section with a dropdown menu showing 'Bob Potts (Connect Client)', a 'Read' access level dropdown, and a 'Share' button. Below this, it states 'This plan is being shared with the following users:'. A table lists the users and their access levels:

User	Access
Adam Pitt (Adviser/Broker)	Read
Ben Cantrell (FM Admin)	Read & Write
Wendy Carr (Paraplanner)	Read & Write

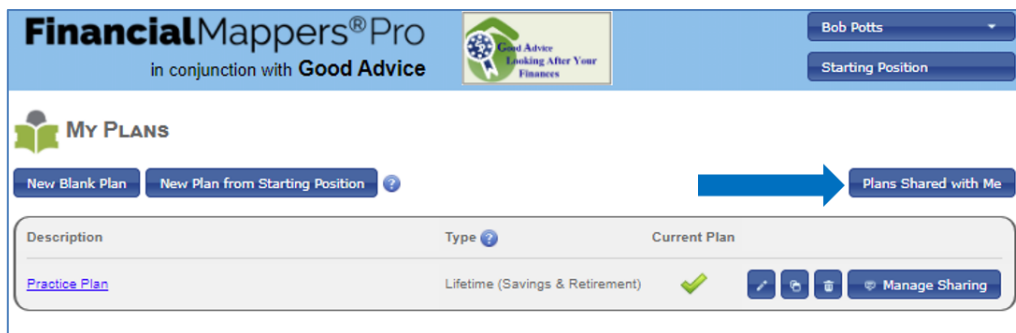
At the bottom right of the dialog is a 'Close' button.

After the **Share** button is clicked, a message may be sent to the client.

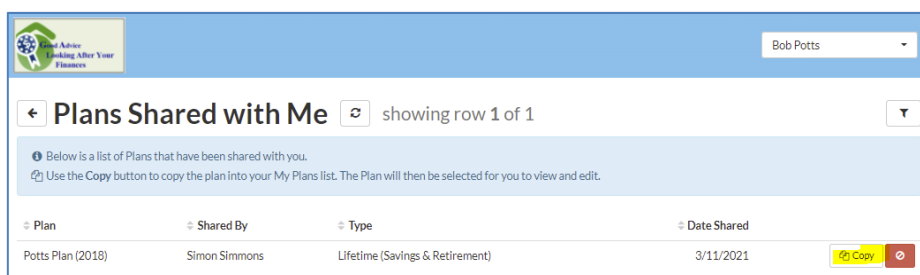
The screenshot shows a 'Notify User' dialog. It contains a message stating: 'An email will be sent to Bob Potts (Connect Client) to notify them that this plan has been shared with them. You can optionally include a personal message in the email using the editor below.' Below this is a text area for a 'Message (Optional)'. At the bottom, there are two buttons: 'Don't Notify' and 'Send Notification'.

After Bob receives the message, he can log into his account and on the **My Plans** page, he can select the button **Plans shared with Me**. (Note the client's interface is slightly different from that of the Advisers. In addition, all clients, have one pre-loaded Practice Plan)

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Bob clicks on the button **Plans Shared with Me** where he must make a copy of the plan.



The IP is transferred to Bob Potts, who can now modify the plan as he wishes.



Bob can also change the name of the plan, by going the **My Plans** page and clicking on **EDIT** (pencil) icon.

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in conjunction with **Good Advice**

Bob Potts
Starting Position

MY PLANS

New Blank Plan New Plan from Starting Position Plans Shared with Me

Description	Type	Current Plan
Practice Plan	Lifetime (Savings & Retirement)	Manage Sharing
Copy of Potts Plan (2018)	Lifetime (Savings & Retirement)	Manage Sharing

The name is changed to **Potts Plan (2018) – Amended**.



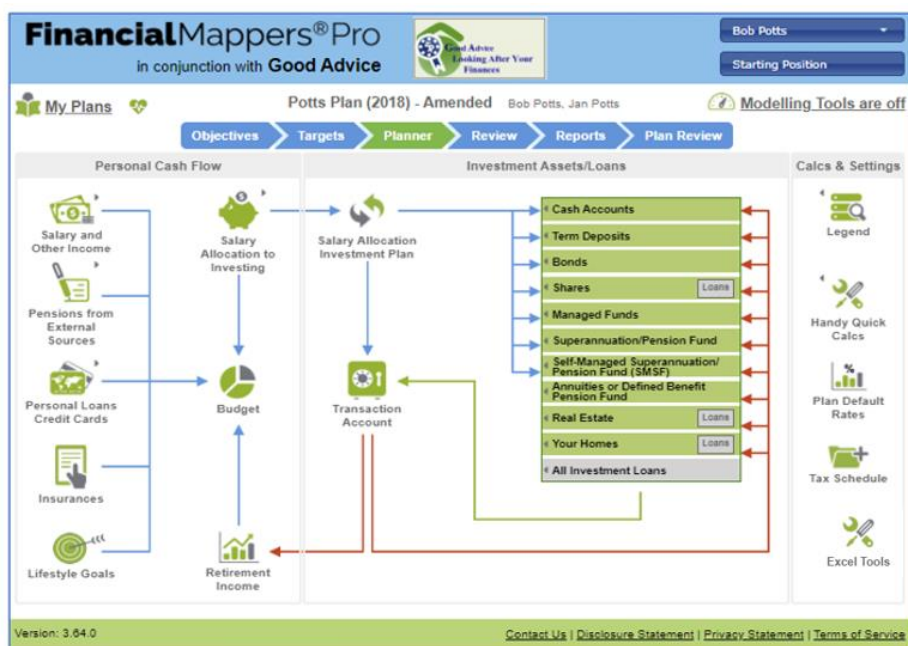
FinancialMappers® Pro
in conjunction with **Good Advice**

Bob Potts
Starting Position

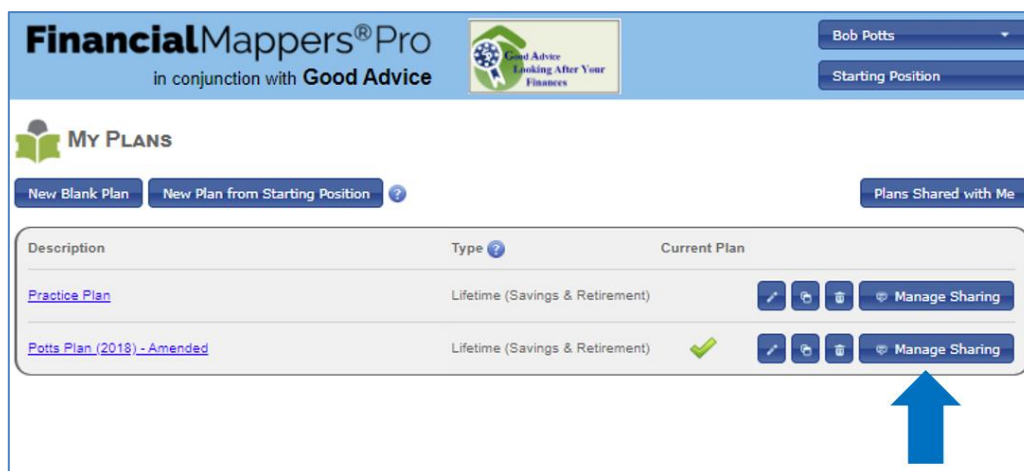
PLAN DETAILS

Plan Name: **Potts Plan (2018) - Amended**
Plan Type: Lifetime (Savings & Retirement)
Calendar Year (At start of plan): 2018
Length of Plan (years): 30 Years
Joint Plan: ☒ [Edit account details](#)
Switch Partner Details
Partner 1: Given Name: Bob, Family Name: Potts, Initials (Identifier): Bob, Age (At start of plan): Age 50, Age at Start of Retirement Drawdowns: Age 65, Year at Start of Retirement: 2033, Target Retirement Income (at today's value): \$75,000, Currency: Dollar
Partner 2: Given Name: Jan, Family Name: Potts, Initials (Identifier): Jan, Age (At start of plan): Age 50, Age at Start of Retirement Drawdowns: Age 65, Year at Start of Retirement: 2033, Target Retirement Income (at today's value): \$75,000, Currency: Dollar
Total: \$150,000
Save Cancel
Version: 3.04.0
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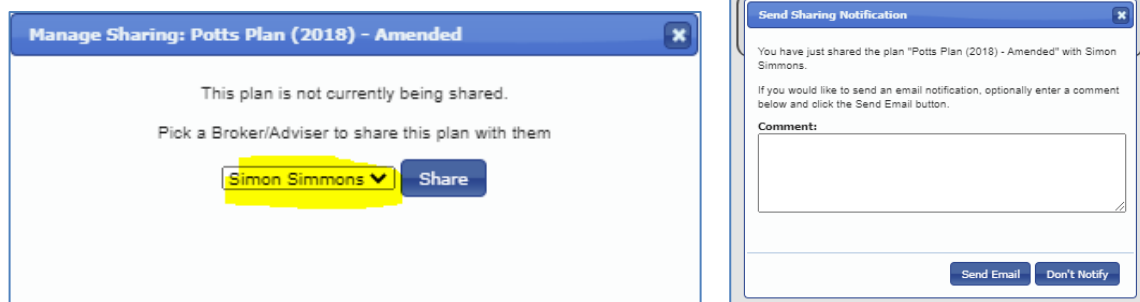


If the client wished, they could share back the amended plan with the adviser. On the **My Plans** page, the **Manage Sharing** button would be selected.

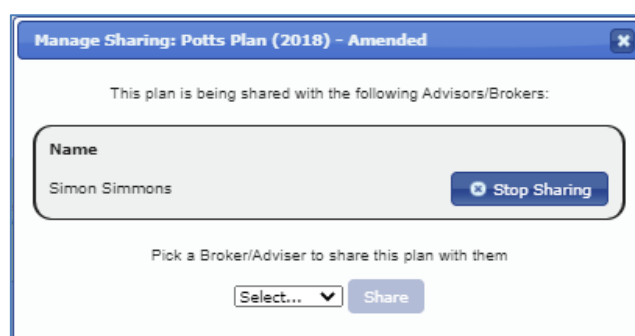


Bob selects Simon Simons from the dropdown list. (Currently, Bob is also a client of Adam Pit, so he selects the adviser with whom he wants to share the plant) A message can also be sent at the same time.

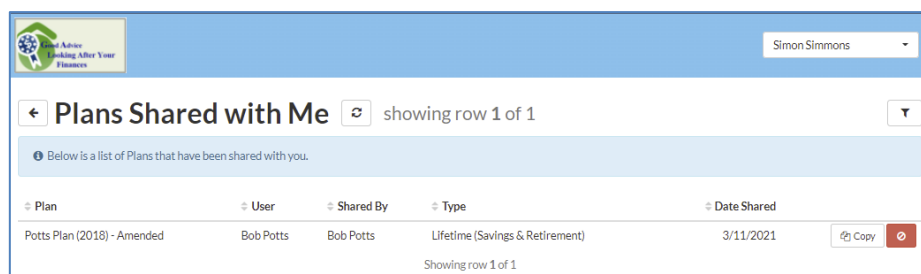
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Bob can **Stop Sharing** the plan at any time.



Simon Simmons would then go to **Plans Shared with Me**, find the plan, and make a copy of the plan before he could access it.



Client Sharing Plans with Adviser

You have seen how Bob Potts was able to modify a plan shared by his adviser and then share the amended plan back to the adviser.

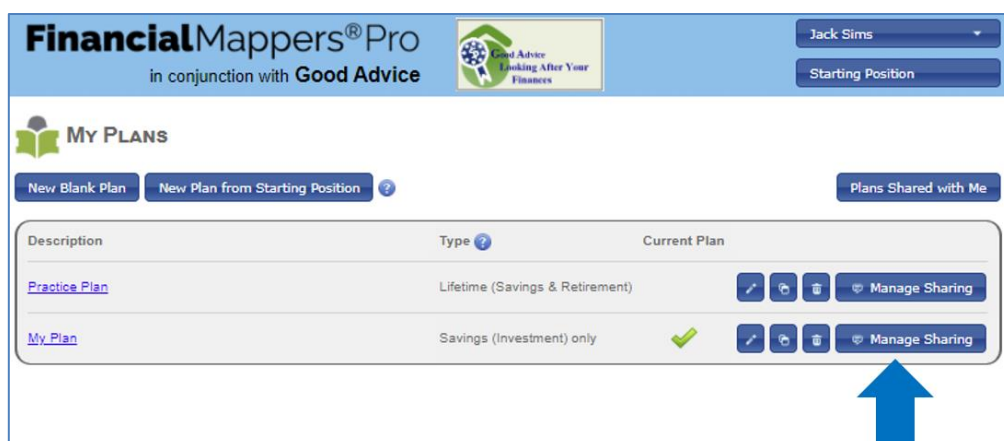
Financial Mappers provides a business model, where clients use a **Connect Financial Mappers Account** to create their plans, and then share the plan and ask for advice when required.

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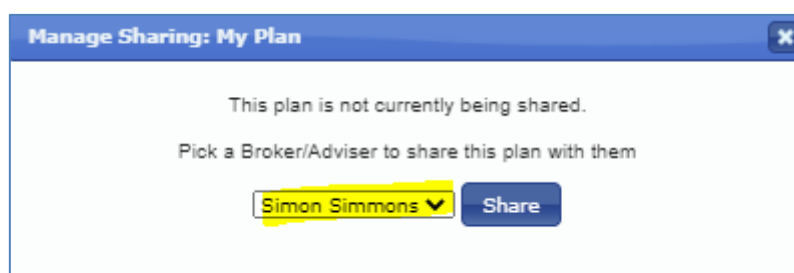
The idea is to engage with your prospective full-service clients to keep them in your sales funnel and in the meantime generate income through a subscription model. The cost of the subscription could include additional services, for example, an automated financial literacy program, and perhaps a periodic phone chat where you can discuss general planning advice.

This should help your client get engaged with the planning process, start a savings plan, and reach out for advice when required. This advice can then be charged as a “fee for service” in addition to their annual subscription.

Here is an example of Jack Sims, who is a **Life Connect** client of Simon Simmons. Jack has completed a plan called My Plan and wants to share the plan and ask for some advice.



Jack selects the name of his adviser, Simon Simmons, and clicks the **Share** button.



Jack sends an email with the plan saying he would like insurance advice.

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Manage Sharing: My Plan

This plan is being shared with the following Advisors/Brokers:

Send Sharing Notification

You have just shared the plan "My Plan" with Simon Simmons.

If you would like to send an email notification, optionally enter a comment below and click the Send Email button.

Comment:

Dear Simon

After completing my Insurance Needs Evaluation, I would like you to review my insurance and make recommendations.

Jack Sims

Send Email **Don't Notify**

Note that Jack can stop sharing at any time.

Manage Sharing: My Plan

This plan is being shared with the following Advisors/Brokers:

Name
Simon Simmons

Stop Sharing

Simon Simmons, adviser goes to **Plans for Jack Sims** and clicks on the button **Plans Shared with Me**.

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Simon Simmons

Plans for Jack Sims showing rows 1 to 5 of 5

Plans Shared with Me

Simon makes a copy of the plan.

Simon Simmons

Plans Shared with Me showing rows 1 to 2 of 2

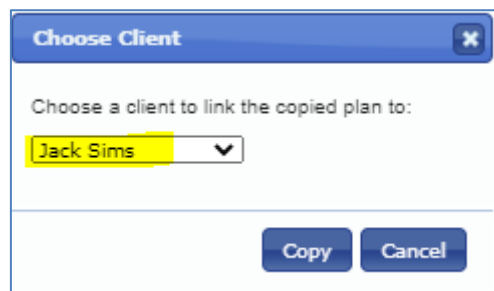
Below is a list of Plans that have been shared with you.

Plan	User	Shared By	Type	Date Shared
Potts Plan (2018) - Amended	Bob Potts	Bob Potts	Lifetime (Savings & Retirement)	3/11/2021
My Plan	Jack Sims	Jack Sims	Savings (Investment) only	3/11/2021

Showing rows 1 to 2 of 2

Financial Mappers Pro Masterclass

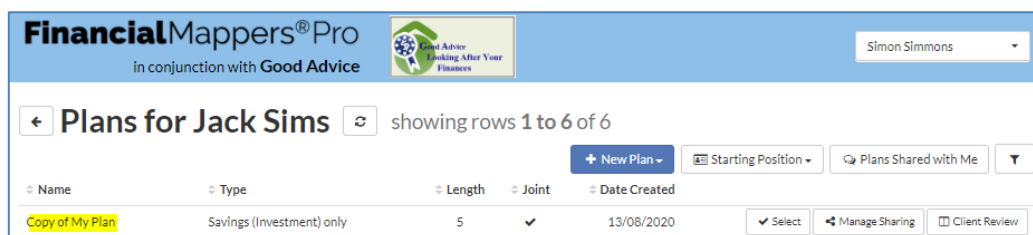
A copy of the plan is assigned to Jack Sims.



Simon Simons can now review the plan, generate the Insurance Needs Evaluation, and make recommendations, regarding the client's insurance needs.



The name of the plan can be changed, by clicking **My Plans** and selecting the name of the plan.



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Edit Plan

Plan Name [?] Plan Type [?] Calendar Year Currency

Length of Plan [?]

Joint Plan [?] ☒ Joint Plan ☐ Swap Principal/Partner Details

Principal

Firstname Surname

Initials (Identifier) Target Retirement Income [?]

Total \$100,000

Age at Start of Plan

Partner

Firstname Surname

Initials (Identifier) Target Retirement Income [?]

Total \$100,000

Age at Start of Plan

Actions
☒ Select ☐ Manage Sharing ☐ Client Review

Starting Position

Since creating this document a number of features have been added to **Starting Position**. This includes the ability to change the **Currency** throughout all the client's plans. In addition, a **Continue to My Plans** button and **Adviser Notes** button have been added.

Starting Position [?] Bob Potts

Last modified by: Simon Simmons (18/01/2021 3:15 pm)

STARTING POSITION OPTIONS [?]

Single or Joint Plan Currency

The **Starting Position** is a shared space, with either the client or the adviser able to update information. The last person to update the information is listed, together with the date and time. *(Note the **Wealth Tracker** and **Adviser Notes** are not visible on the Client's view of the software – this information can only be updated by the adviser)*

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in conjunction with Good Advice

Good Advice
Looking After Your
Finances

Simon Simmons

Back

Starting Position

Jack Sims

About Me & My Family

Adviser Notes

Wealth Tracker

Last modified by: Jack Sims (28/06/2020 8:12 am)

Import CSV

Export CSV

Continue to My Plans

STARTING POSITION OPTIONS

Reset Starting Position

Single Plan

Joint Plan

Currency
Dollar

SALARY

Save

Cancel

Description	Owner	Annual Amount	No. of Years
Salary A	Jack	\$160,000	30 Years
Salary B	Betty	\$140,000	30 Years

Depending on your relationship with the client, there are several ways this space can be used.

- **Mini Fact Find**: For your clients on reduced services, they can enter the data about their personal situation and their current financial position to replace the standard Fact Find. Either the adviser or the client can then import this information into either their reports or plans.
- **Update Starting Position** with information the adviser may not have. For example, the adviser may want the client to complete a full and detailed **Budget**, which can then be imported into plans. Ask the client to complete any **Milestones**.

This is the view of the **Starting Position** from the client's account.

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in conjunction with **Good Advice**

Jack Sims
Starting Position

[Back](#) **Starting Position** [About Me & My Family](#) [Adviser Notes](#) [Wealth Tracker](#)
Last modified by: Jack Sims (28/06/2020 6:12 am) [Import CSV](#) [Export CSV](#) [Continue to My Plans](#)

STARTING POSITION OPTIONS [Reset Starting Position](#)
[Single Plan](#) [Joint Plan](#) Currency Dollar

SALARY [Save](#) [Cancel](#)

Description	Owner	Annual Amount	No. of Years
Salary A	Jack	\$160,000	30 Years
Salary B	Betty	\$140,000	30 Years

PERSONAL ASSETS [Save](#) [Cancel](#)

Description	Owner	Type	Current Value
Car B	Betty	Vehicle	\$15,000
Car A	Jack	Vehicle	\$20,000
Caravan	Joint	Other	\$40,000
Furniture & Fittings	Joint	Vehicle	\$15,000

PERSONAL BUDGET [Save](#) [Cancel](#)

COMMITMENTS	\$0
HOME	\$11,000
UTILITIES	\$5,000
EDUCATION	\$0
HEALTH	\$7,400
SHOPPING	\$17,000
TRANSPORT	\$10,000
ENTERTAINMENT	\$9,600
OTHER	\$0
MISCELLANEOUS	\$0

Total Living Expenses \$60,000

MILESTONES [Save](#) [Cancel](#)

Description	Owner	Year of Event
Buying a car	Betty	2020

Starting Position Report

Where the client has completed the About Me and My Family, the information is provided on the last page. If the information has not been completed, then it will advise.

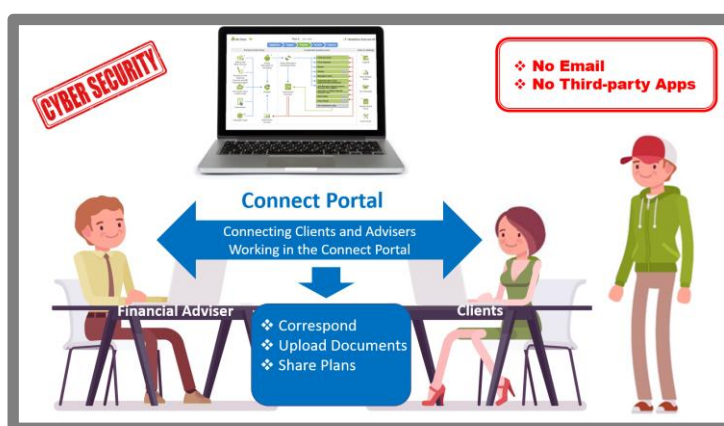
This is a sample from Bob Potts who completed that section:

Starting Position Report	Based on plan "Starting Position" Bob Potts and Jan Potts
 About Me and My Family	
Family	
My wife and I were both born in 1970, are currently 50-years old. We have two adult children and 3 grandchildren.	
Peter (Born 1995) married with 2 children	
Judy (Born 1993) married with 1 child	
Employment	
I am looking to upgrade to a better position in a few years.	
Health	
We are both in good health and non-smokers	
Estate Planning	
We both have Wills and Enduring Power of Attorney. All documents are held with our solicitor (Jackson Lawyers)	
Investment Experience	
We are not very experienced investors but have started reading some books on the subject.	
We are not sure what 4 (Risk/Return) & 5 (Debt Servicing Ratio) mean.	
We would love to join any Financial Literacy Program you may have.	
Investment Risk Profile	
We would not consider ourselves risk-takers, but we do want to be involved in the management of our investments.	
Our preferred investment would be in (3) a High Growth Fund. However, we would like to keep the investment property we currently own.	
Your Objectives for the Next 5 Years	
1. Increase our savings so we can be self-funded retirees - Retirement Income of \$150,000	
2. Upgrade our home in about 6 years	
Advice You Require	
We would like to know if we are on track to be self-funded retirees	
We would like you to review our plan and make recommendations as you see fit.	

Connect Portal

Cyber-security is increasing in concern for both your clients and ASIC. When you start to read articles like [“The death of email: Why advisers need to change for security”](#) in the *Professional Planner*, it won't be long before this type of article will be found in articles published for the public. When your clients start to ask questions about your cyber-security, will you have the best response.

Financial Mappers is one of the first companies to fully address this issue.



A **Connect Portal** has been created where both the adviser and client can correspond within the software. The only email used is to advise either the client or adviser that new information has been uploaded to the portal for them to access.

To use this service, your client must be either a **Lite Connect Client** (plan limit to 5-years) or a **Connect Client** (plan limit to 50-years). In addition, the Adviser will need to have an account.

There are fees for using the *Connect Client* feature and these are listed in *Resources/Pricing*. Advisers can continue to have Clients, that are not connected, but any exchange of information will need to be through email. It may be that you already have a secure email service provider for sharing information.

Both the adviser and the client will have an area called "**Connect Portal**". The same information is displayed for both client and advisers. Messages between the two parties are referred to as **Threads**. Over time you will develop a series of Threads. It is important that before you start using Threads, create a naming system for your Threads so they are easy

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to locate. Threads can be ordered by **Date Updated** or **Date Created**. This is a set of three threads

The screenshot shows the 'Connect' page for client Peter Jones, advised by Simon Simmons. The page header includes the 'Good Advice Looking After Your Finances' logo and the user's name 'Simon Simmons'. Below the header, there's a navigation bar with a back arrow, the word 'Connect', and client/adviser information. A dropdown menu is set to 'By Date Updated'. A '+ New Thread' button is in the top right. A message box says 'Select a thread from the list on the left, or create a new one.' The main content area lists three threads: 'Your client review report is ready' (1 reply), 'Comparison of two plans' (2 replies, 1 like), and 'Plan Map' (3 replies, 2 likes). Each thread includes a brief description and timestamps for creation and updates.

The Process

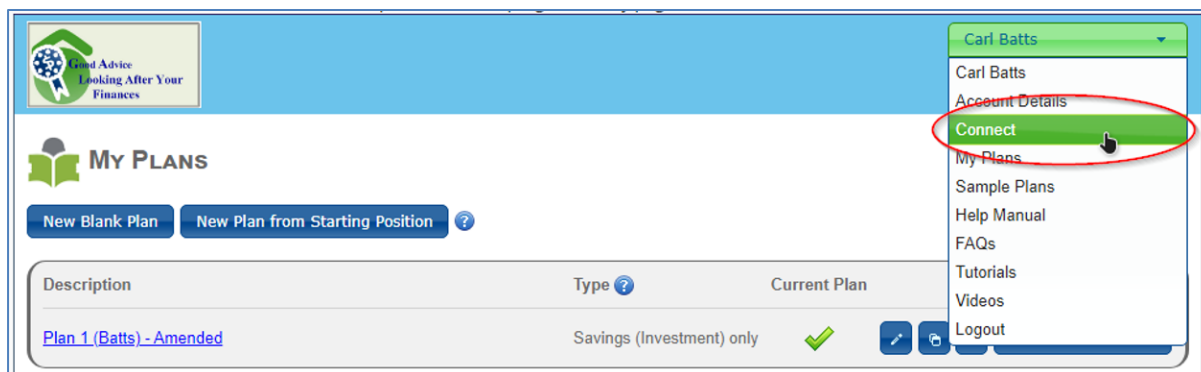
Adviser selects the **Connect** button to right of the client's name.

The screenshot shows the 'My Clients' table, displaying rows 1 to 20 of 43. The table has columns for Client ID, First Name, Surname, Email, Type, and CMS. Each row has 'Connect' and 'Plans' buttons to its right. The 'Connect' button for the client 'Carl Batts' is circled in red. The table also includes a '+ Add Client' button and a 'Plans Shared with Me' filter.

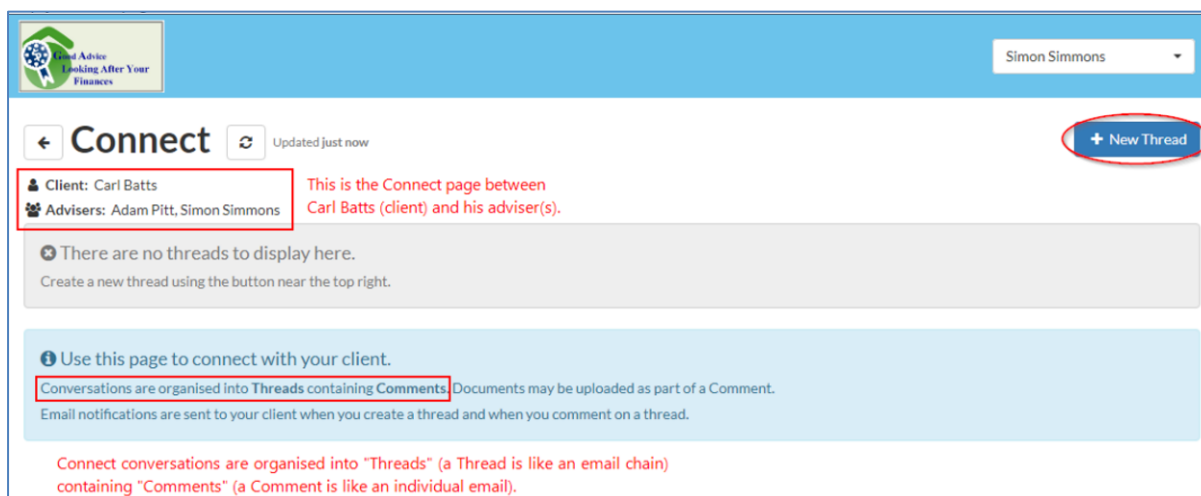
Client ID	First Name	Surname	Email	Type	CMS	Connect	Plans
A 100-01	John	Abbott	finmappers+171@gmail.com	Connect Client	Worksorted	Connect	Plans
A 105-10	Mary	Adams	adamszzz@yahoo.com	Connect Client		Connect	Plans
A350	Buck	Andrews	finmappers+235@gmail.com	Connect Client		Connect	Plans
A 110-25	John	Appleby	finmappers+087@gmail.com	Connect Client		Connect	Plans
A 100-02	Ben	Archer	finmappers+172@gmail.com	Connect Client	Worksorted	Connect	Plans
A 105-11	Carl	Batts	battszzz@yahoo.com	Connect Client		Connect	Plans
XXX 100 2000	Brad	Black	brad.blackzzzz@gmail.com	Client		Connect	Plans

For Connect clients, there will be a new item, "**Connect**" in the dropdown at the top right of every page.

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Here is an empty **Connect Page** for the adviser, Simon Simmons and client, Carl Batts.



Once you start creating threads, they will be listed on the left-hand side of the page.

- Click a thread to select it. When a thread is selected, its discussion is shown on the right-hand side of the page.
- Click the small "x" to close the selected thread.

The screenshot displays the 'Connect' interface. At the top, there's a header with a back arrow, the title 'Connect', a refresh icon, and the text 'Updated just now'. On the right is a '+ New Thread' button. Below the header, it shows 'Client: Carl Batts' and 'Advisers: Adam Pitt, Simon Simmons'. A dropdown menu is set to 'By Date Updated' with a downward arrow. A red box labeled '1' highlights a list of threads on the left. The threads are: 'EOFY information request' (created 21 minutes ago, updated a few seconds ago), 'Yet another...' (created 4 minutes ago), 'Another thread' (created 5 minutes ago), and 'Lorem ipsum' (created 6 minutes ago). A red box labeled '2' highlights the 'Discussion area for currently selected thread.' on the right. This area shows the details of the 'EOFY information request' thread, including the message body, a 'Close button' (labeled '3'), and a list of replies. The first reply is from Carl, 9 minutes ago, with attachments 'Something or other.pdf' and '3284 Reports - Preset Analysis Configs.docx'. A second reply is from 'You' (3 minutes ago) saying 'Thanks for your quick reply, I'll be in touch soon.' A third reply is from Carl (a few seconds ago) saying 'Let me know if you need anything else. I'll be in the office all day.' A 'Reply' button is at the bottom right.

To start a conversation, either the Client or one of the Advisers can create a **New Thread**. The other party is notified by email.

- Click the **New Thread** button.
- Write a subject and message.
- Click the **Create Thread** button.

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The screenshot shows the 'Connect' page in the Financial Mappers Pro interface. At the top, there's a header with the logo and a dropdown menu showing 'Simon Simmons'. Below the header, the 'Connect' section displays client information: 'Client: Carl Batts' and 'Advisers: Adam Pitt, Simon Simmons'. A blue box contains the text: 'Hi there Carl, It's that time of year again when I like to conduct a review of your investment portfolio blah blah blah... Could you please supply me with documents X,...'. To the right, a 'Thread Discussion' window is open, showing the same text in a rich text editor. The window has a title bar 'Thread Discussion' and a close button. Below the text, there's a 'Create Thread' button. Red circles with numbers 1, 2, and 3 highlight the '+ New Thread' button, the 'Thread Discussion' window, and the 'Create Thread' button respectively.

Once the thread is created, Carl is sent an email notification. Both parties can see the thread on their **Connect** page and can reply to it. To reply to a thread, click on the **Reply** button.

The screenshot shows the 'Connect' page in the Financial Mappers Pro interface, similar to the previous one, but with a different user logged in, 'Carl Batts'. The 'Thread Discussion' window is open, showing the same text. At the bottom right of the window, a 'Reply' button is highlighted with a red circle. The 'Connect' section on the left shows the same text, but it also includes a timestamp 'Created 7 minutes ago'.

You can type the message and attach documents using the **Attach File** button.

Thread Discussion

EOFY information request

Hi there Carl,

It's that time of year again when I like to conduct a review of your investment portfolio blah blah blah...

Could you please supply me with documents X, Y, Z at your earliest convenience?

Thanks,

Simon Simmons

File Edit View Insert Format Tools Table

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Formats

B *I*

A A

14px

List

List

Table

Table

Image

Link

Thanks for being on the front foot, Simon.

Please find attached the requested documents.

Regards,

Carl

P

POWERED BY TINYMCE

Attachments

Something or other.pdf

3284 Reports - Preset Analysis Configs.docx

Attach file...

Send Comment

X

These are two documents
that I have attached.

Once the comment is saved, it shows in a blue or grey bubble in the **Thread Discussion** area. Blue equals your comments and grey equals someone else's comments. You can also see the name of the person who sent a comment in the small text just below the comment. This is the Client (Carl) view.

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Thread Discussion

EOFY information request

Hi there Carl,

It's that time of year again when I like to conduct a review of your investment portfolio blah blah blah...

Could you please supply me with documents X, Y, Z at your earliest convenience?

Thanks,

Simon Simmons

Thanks for being on the front foot, Simon.

Please find attached the requested documents.

Regards,

Carl

Something or other.pdf

3284 Reports - Preset Analysis Configs.docx

You

a minute ago

Reply

This is the Adviser (Simon) view:

EOFY information request

Hi there Carl,

It's that time of year again when I like to conduct a review of your investment portfolio blah blah blah...

Could you please supply me with documents X, Y, Z at your earliest convenience?

Thanks,

Simon Simmons

Thanks for being on the front foot, Simon.

Please find attached the requested documents.

Regards,

Carl

Something or other.pdf

3284 Reports - Preset Analysis Configs.docx

Carl 2 minutes ago

Reply

The Connect feature can also be used to share the Client Review link. This means that after your meeting where you have used the **Client Review Gateway**, you can share the link.

First 5-Years of Client Plan

Peter & Mary Jones

Plan Details

Report

Documents

Q&A

MoneySmart Advice

MoneySmart Videos

Book Club

Jones Plan A

Plan Type	Lifetime (Savings & Retirement)		
Plan Length	30 years		
Joint Plan	Yes		
Savings Start Year	2020		
Retirement Start Year	2035		
Name	Initials	Savings Start Age	Retirement Age
Peter Jones	Peter	50	65
Mary Jones	Mary	50	65

Estimated Review Time

It is estimated that you have spent approximately 0 minutes reviewing the Report.

It is estimated that your client has spent approximately 0 minutes reviewing the Report.

Notify Client

Use this form to send a message to your client with a link to view this report.

Client Name (Principal)	Client ID	Email Address
Peter Jones	A110-25	finnmappers+100@gmail.com
Message Please view the information we discussed at our meeting this morning.		

Last sent a few seconds ago

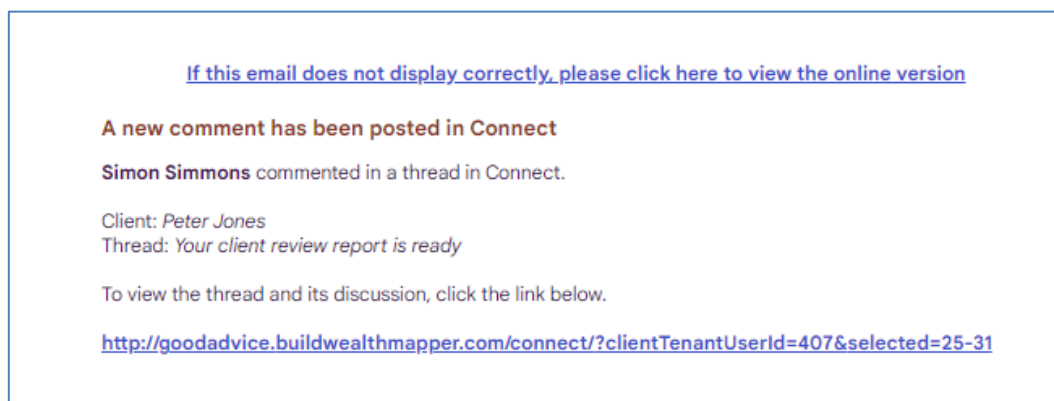
Send via Connect

Version: 3.120.0.3

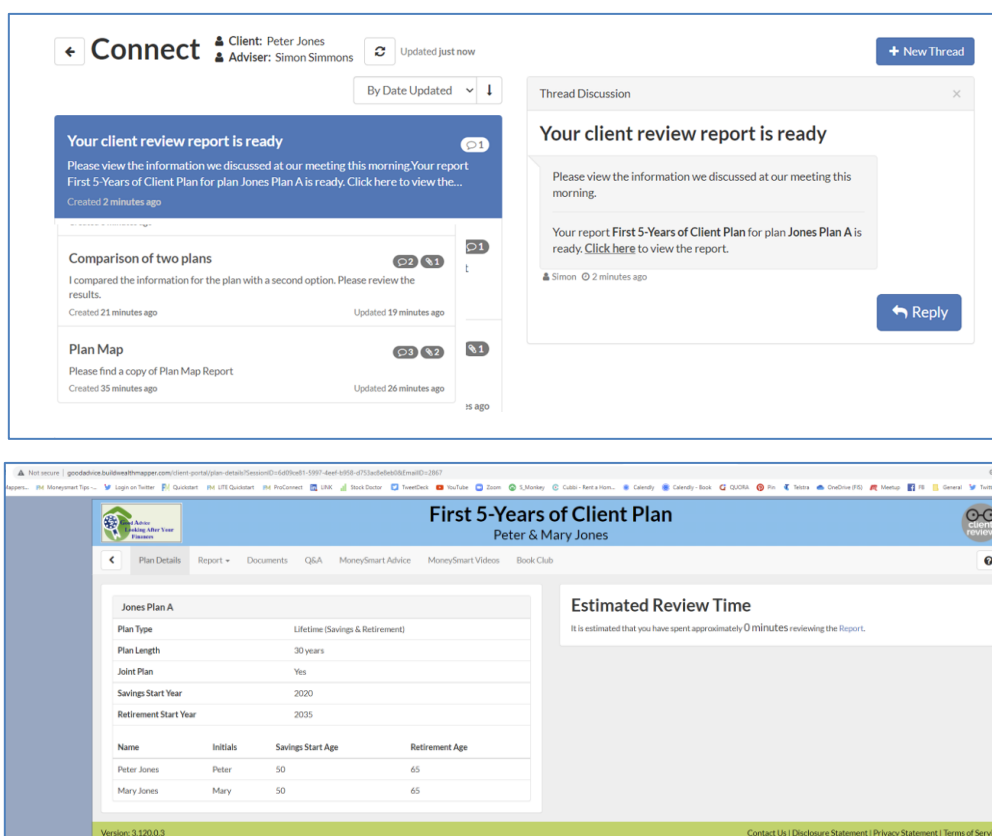
Contact Us | Disclosure Statement | Privacy Statement | Terms of Service

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The client receives an email.



The link takes the client to the Login of their account and then to the Connect section where the Client Review link is displayed.



Where your client is not a Connect Client, you can still share the link using email.

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Notify Client

Use this form to send a message to your client with a link to view this report.

Client Name (Principal)	Client ID	Email Address
Bob Potts	C102-58	pottszzz@yahoo.com

Message

(Optional)

The main part of the button sends a message via Connect, but the adviser can also click the dropdown section on the right-hand side of the button to select the old "Send Email" function.

Last sent 4 hours ago

Send via Connect

client review

Client Review Gateway

To protect client information upgrade your clients to Lite Connect Clients.

This will illuminate EMAIL from your practice

CYBER SECURITY

Message

(Optional)

Last sent 34 minutes ago

Send Email

☒ Also send to Worksorted

Contact

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As the designer of Financial Mappers, Glenis is the most suitable person to answer all your questions about Financial Mappers.

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