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***.

These options are both free of charge.

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.

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 if 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***.

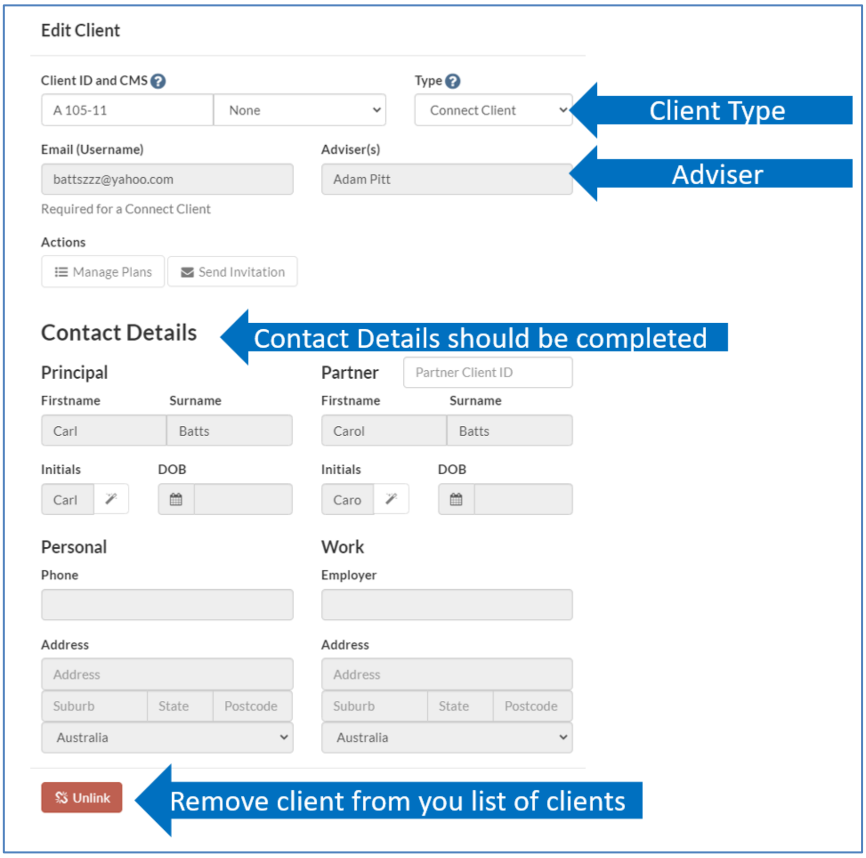
The ***Office Admin*** will only have access to the **User Page**, where they can add and remove clients. They can also assign clients to advisers. They do not have access to client plans.

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.

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



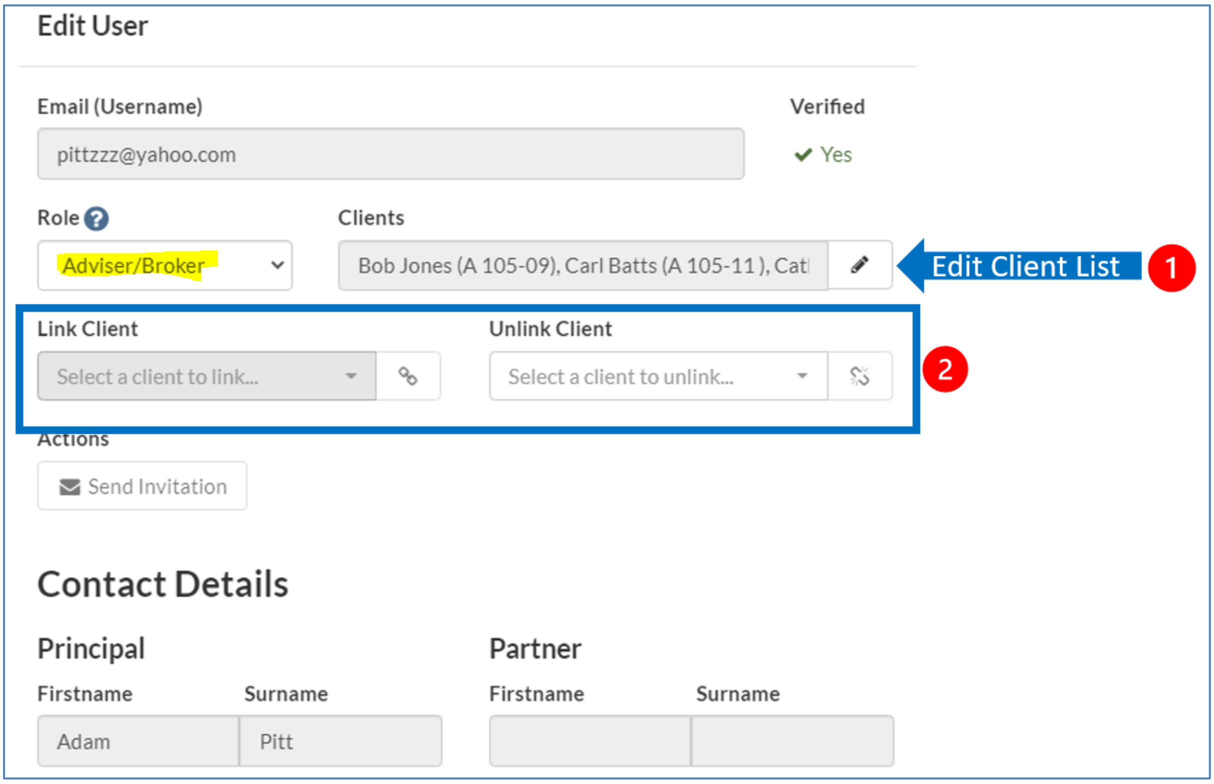
There may be times when a client has more than one adviser in the company. If this is the case, only a team member with the role of the administrator can authorize the additional Adviser/Broker to that client.

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*)

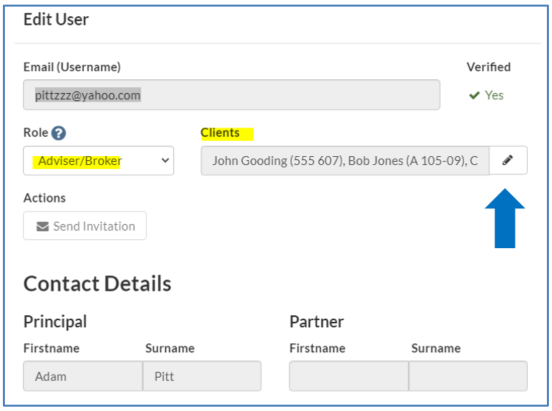
Note that once an adviser has a client assigned to an adviser, they can also access the ***Client Details*** from their ***Client List***. They will not have access to the User Page.

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

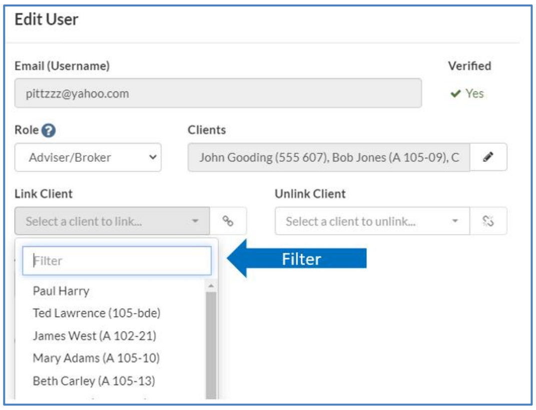


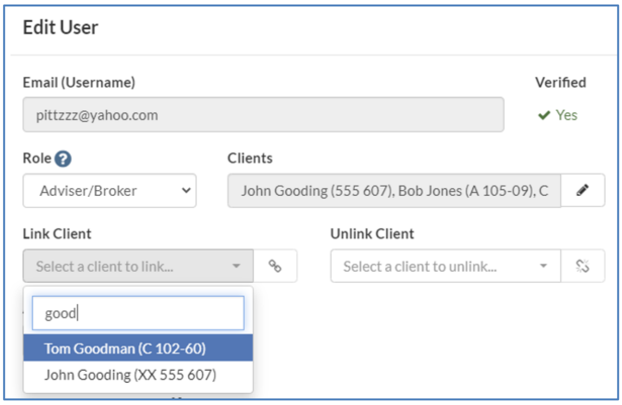
Administrator Adding a Client to an Adviser List

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

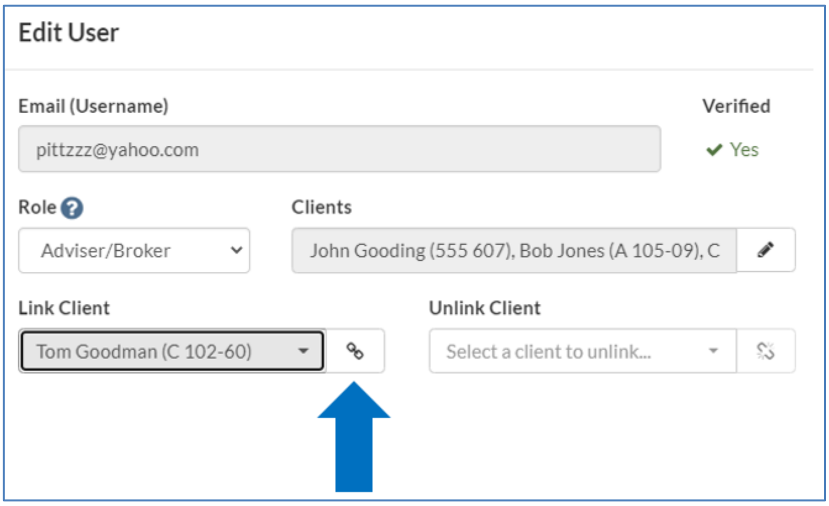


To add a ***Client***, click on the drop-down list for **Link Client** and start to type the Name or Client ID into the filter



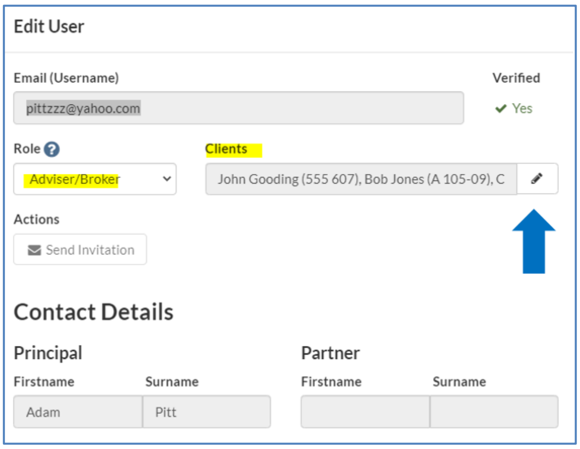


Once the name of the client has been selected, click on the **LINK** icon to the right of the name and the client will be added to the adviser's list of clients.

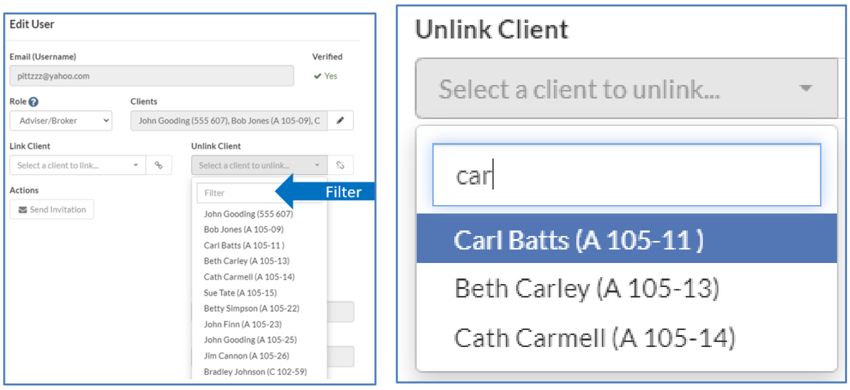


Administrator Removing a Client to an Adviser List

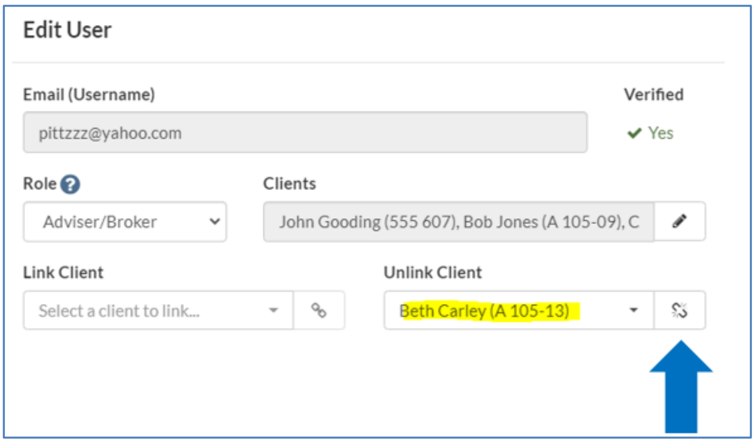
The administrator selects the adviser, Adam Pitt, and clicks on the **EDIT** icon next to ***Clients***.



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

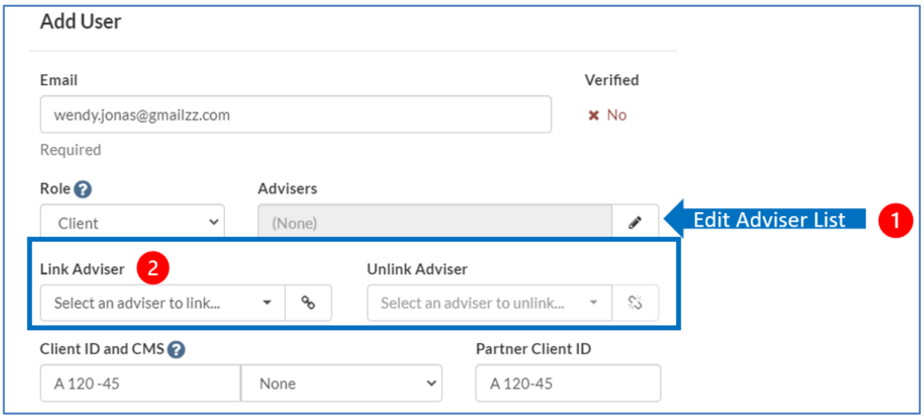


Once the client's name has been selected, click on the **LINK** icon to remove the client from the adviser's list. The Client's name will remain on the User Page.

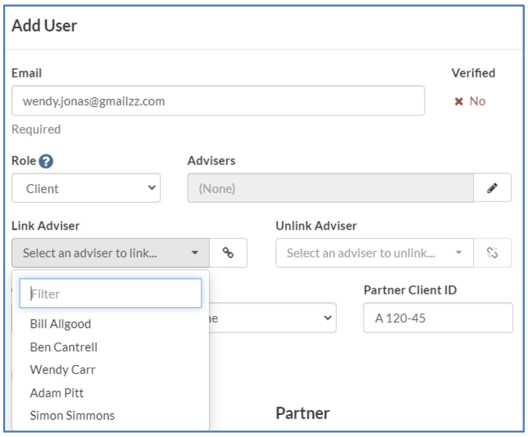


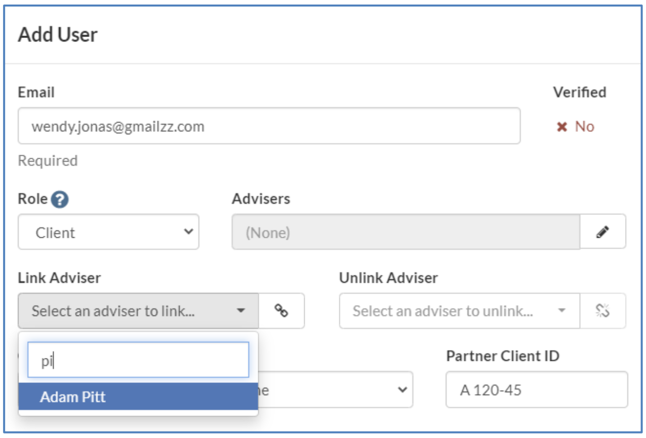
Administrator Adding a New Client to the User Page

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**.

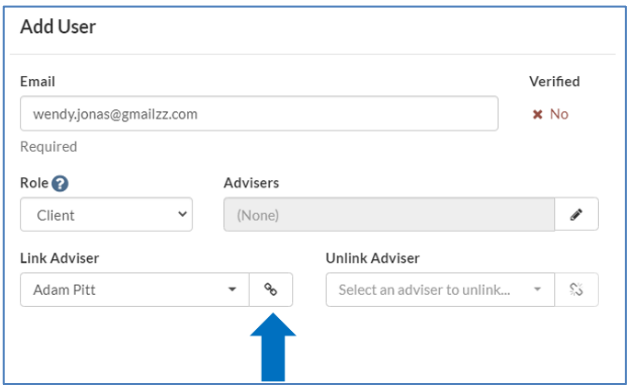


Use the filter to select adviser, Adam Pitt



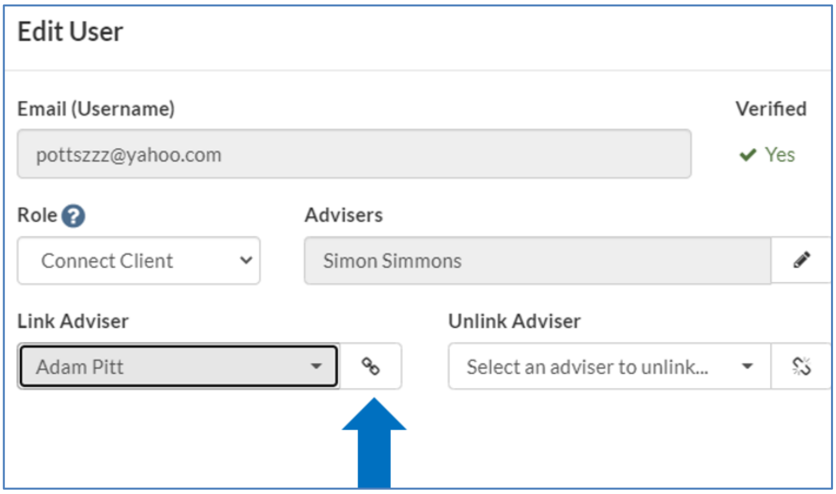


Click on the **LINK** icon to add Adam Pitt as the adviser for this new client.

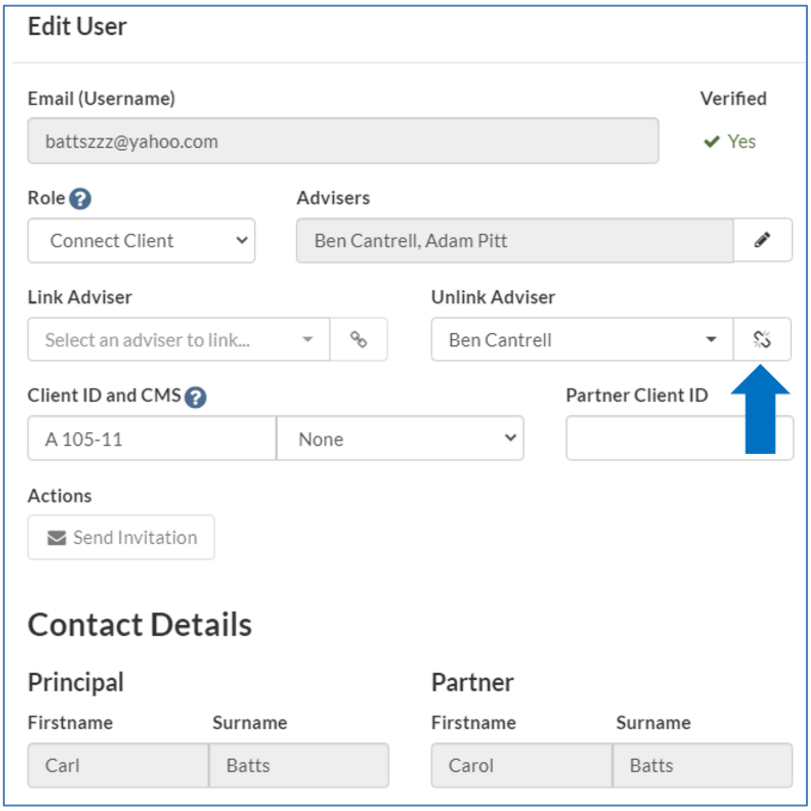


Adding and Removing Clients through the Client's Page

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



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

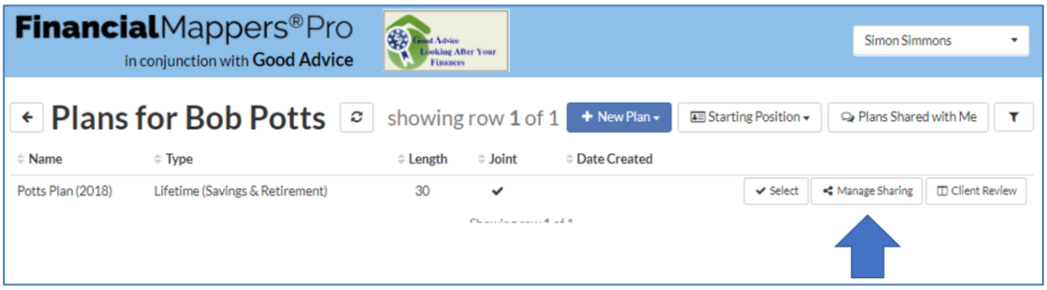


Plan Sharing between Adviser and Paraplanner

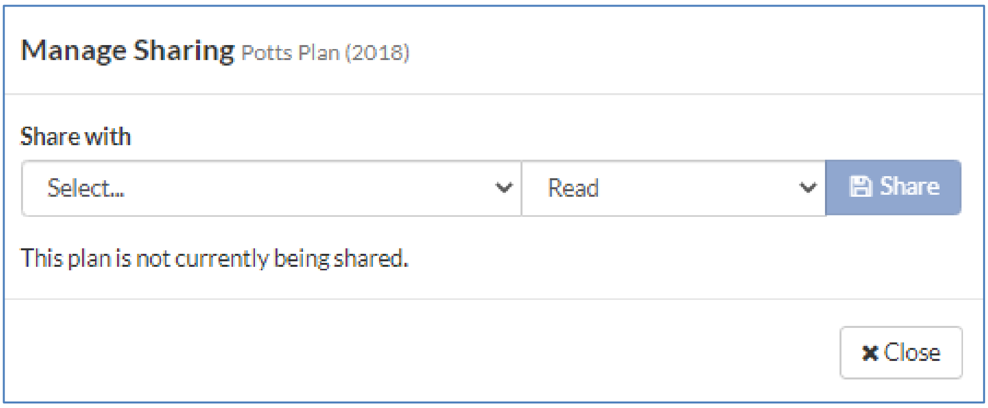
When an Adviser wishes a Paraplanner to work on a plan, the Adviser needs to start the plan, if only just giving the plan a name. The second option is to share the ***Starting Position***, in which case the paraplanner can initiate the plan, <u>but the plan would have to be shared back to the adviser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

Sharing Plans

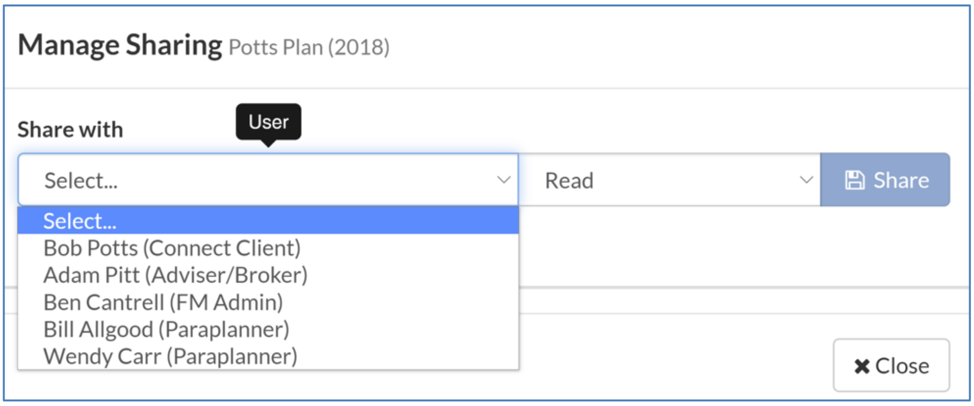
In this example, adviser Simon Simmons wants to share Potts Plan (2018) with the paraplanner Wendy Carr. The adviser selects the **Manage Sharing** button, to the right of the plan.



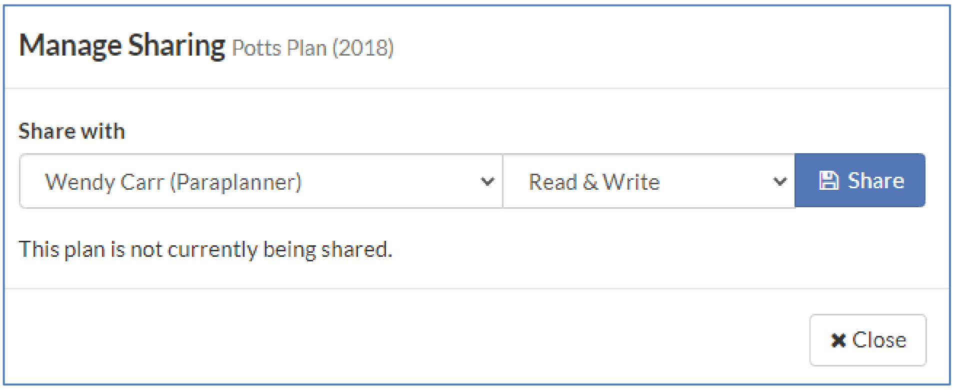
The dialogue box is empty. (Note that the client's plan is currently not being shared with anyone).



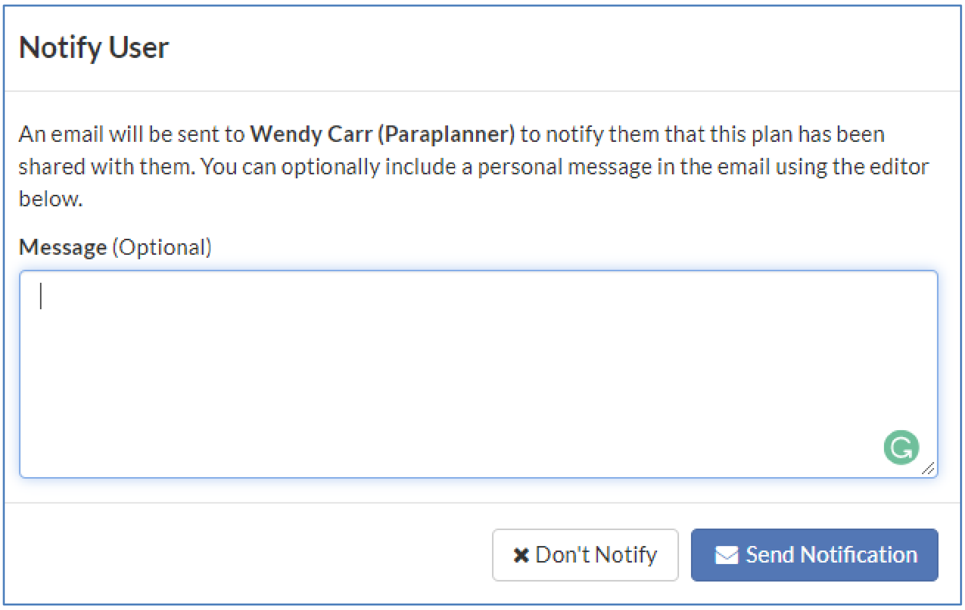
The drop-down list will display the name of the client, together with all adviser/brokers and paraplanners.



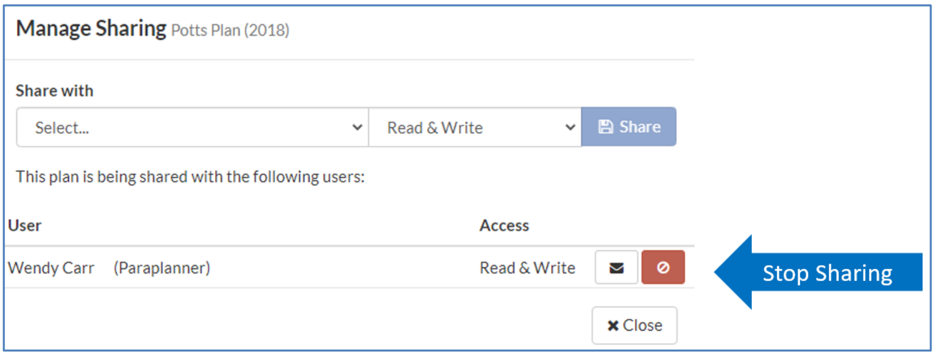
When Wendy Carr (Paraplanner) has been selected, the only **share option** is ***Read & Write***.



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

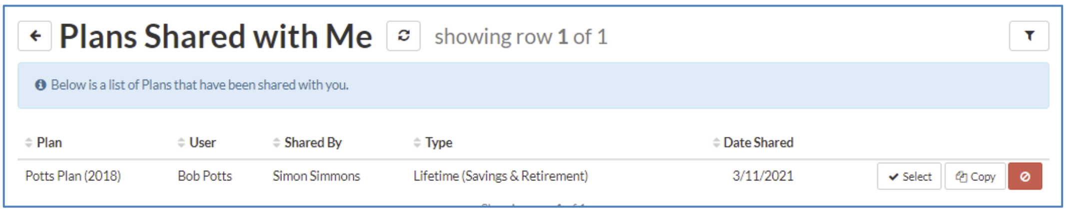


Wendy Carr is now listed as having access to the plan, with the ***Read & Write*** option. To stop sharing, the adviser simply presses the **Red** icon. The **Envelope** icon allows an adviser to send a message.



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.



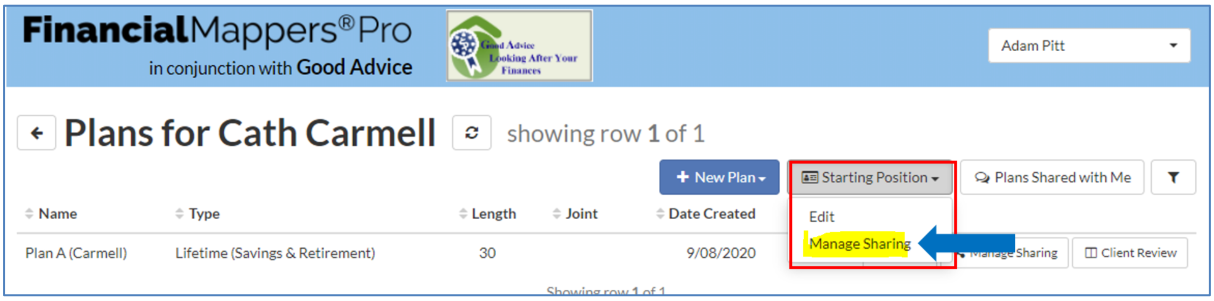
When Wendy has completed her task, <u>she does not have to share the plan</u> back to the adviser, however, she should send a message, outside Financial Mappers to say she has completed her task.

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.

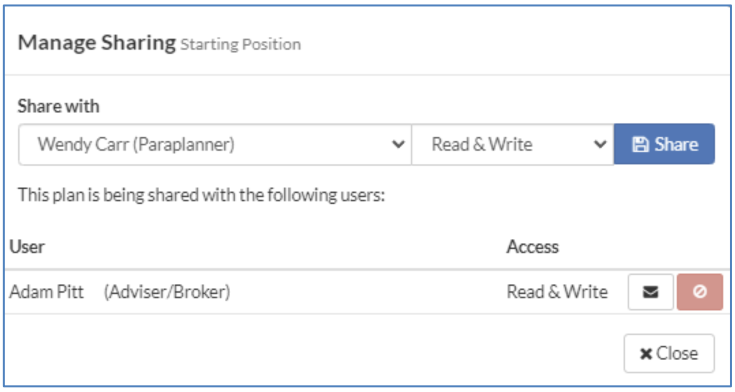
Sharing Starting Position

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**.



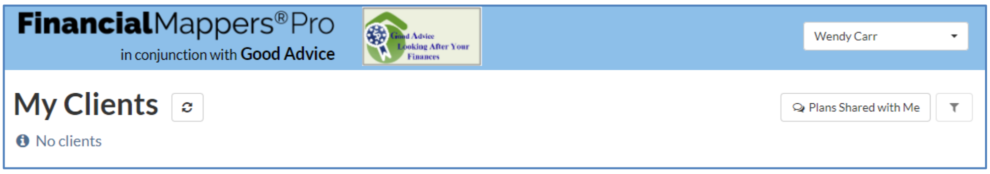
The client Cath Carmell is a Connect Client and therefore has access to the Starting Position. The same applies to the client's adviser, Adam Pitt. Both have ***Read & Write*** access to the ***Starting Position***. This means that either the client or the adviser can edit the Starting Position. Wendy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

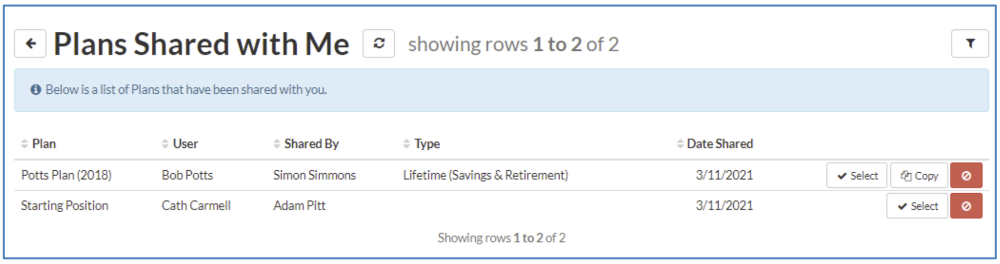


Note that *Adam Pitt*, <u>delete button is greyed out</u> as he always has access to the Starting Position of his clients.

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

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

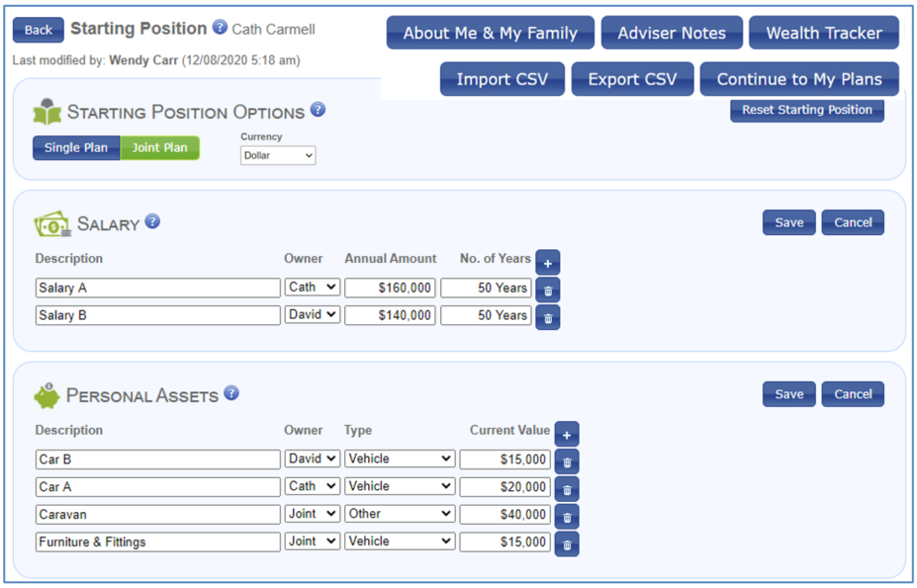




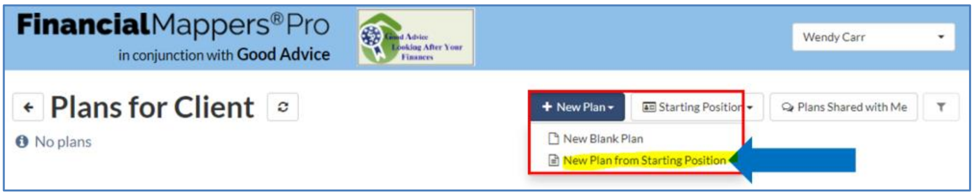
Wendy now has full access to all the features of the ***Starting Position***. That is she can enter information for:

- **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.

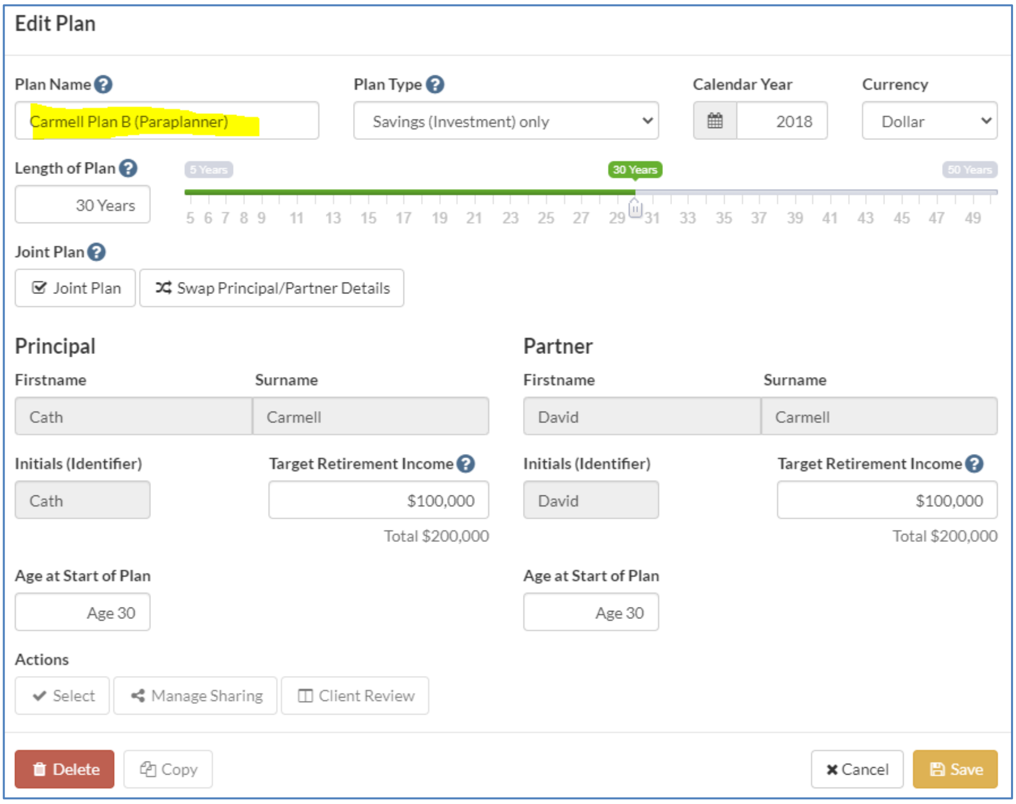
In this case, Wendy is going to complete the Starting Position information, by either importing using a CSV file or manually entering the data. Manual entry should only take five to 10 minutes if all the information is in one central place.



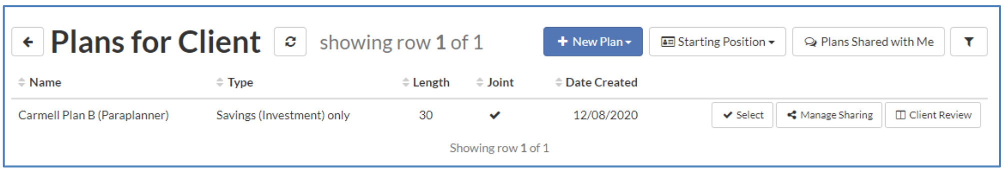
At this point, Wendy could exit the client's information, and leave it ready for the adviser to commence the plan. Alternately she could commence the plan. In this case, she would select the option to commence the plan.



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. <u>She will later need to share this plan back to the adviser who must make a copy and identify the plan as his</u>.

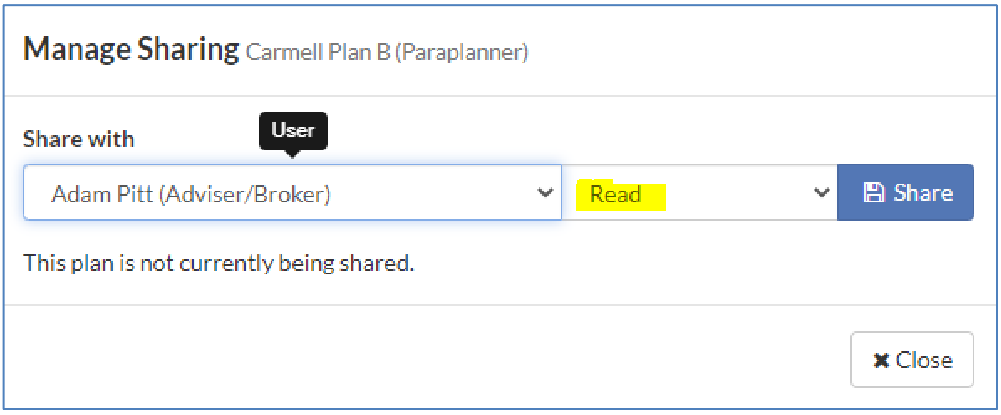


Note that this plan is now listed in the Plans for the Client.

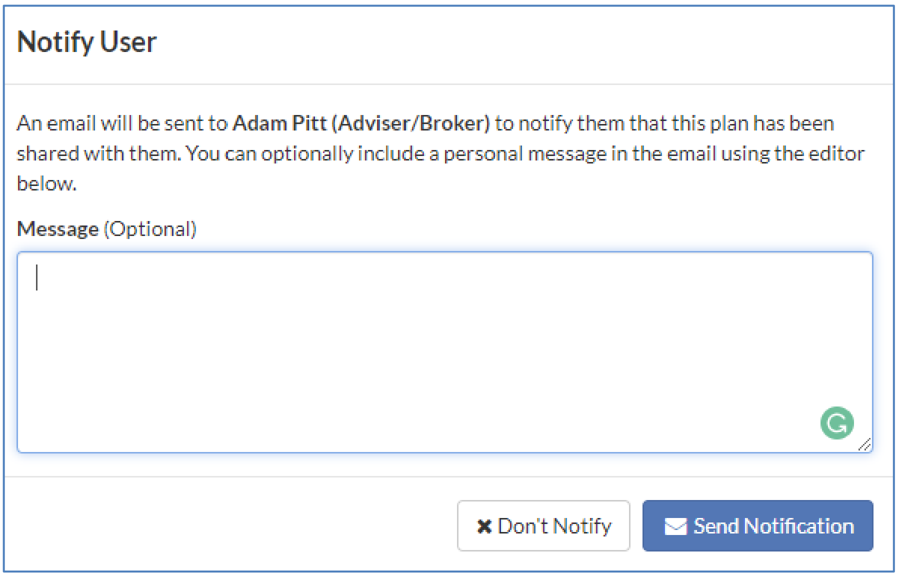


Wendy can now complete the plan, including any information which may be required for the Statement of Advice on the SOA chevron.

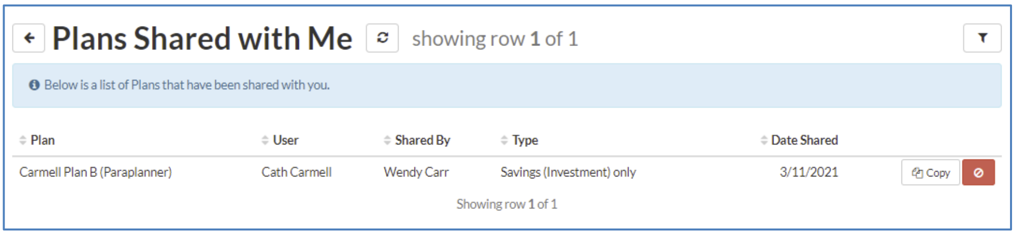
When completed, Wendy must share this plan with the adviser, Adam Pitt by clicking the ***Manage Sharing*** Button. Note that the access option is ***Read***.



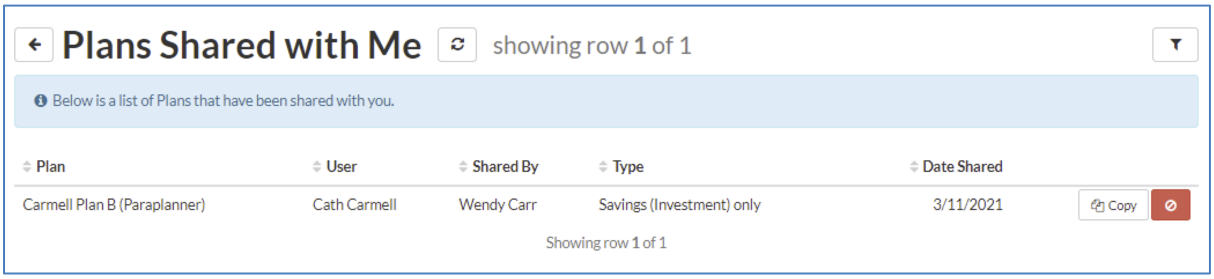
A message can be then sent to the adviser.



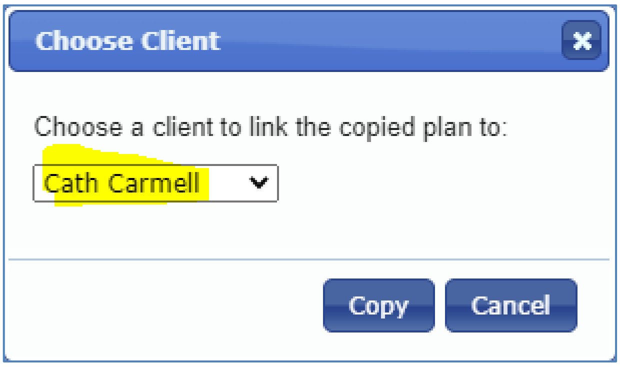
Note that after the paraplanner has completed the work and the adviser has made a copy of this plan, the paraplanner's copy could be deleted to keep lists simple. However, the paraplanner may want to keep a record of their plans created.
Adam Pitt logs into the software and selects ***Plans Shared with Me***.



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.



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

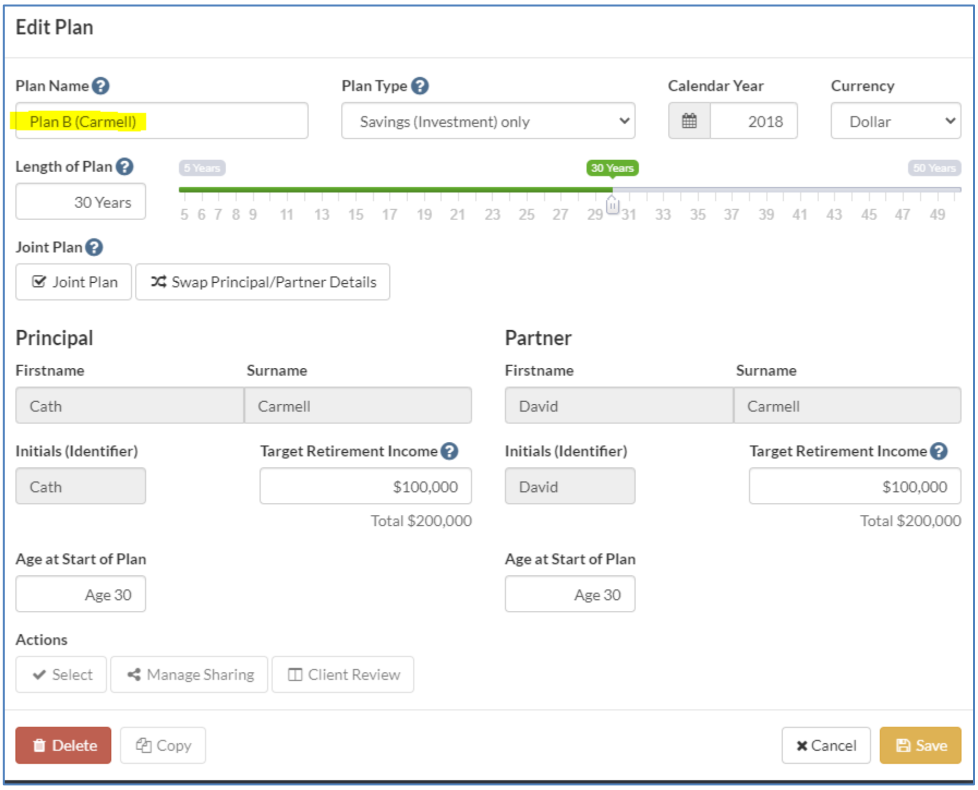


The plan will open with the words Copy of "Plan Name".

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

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

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.



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**.)

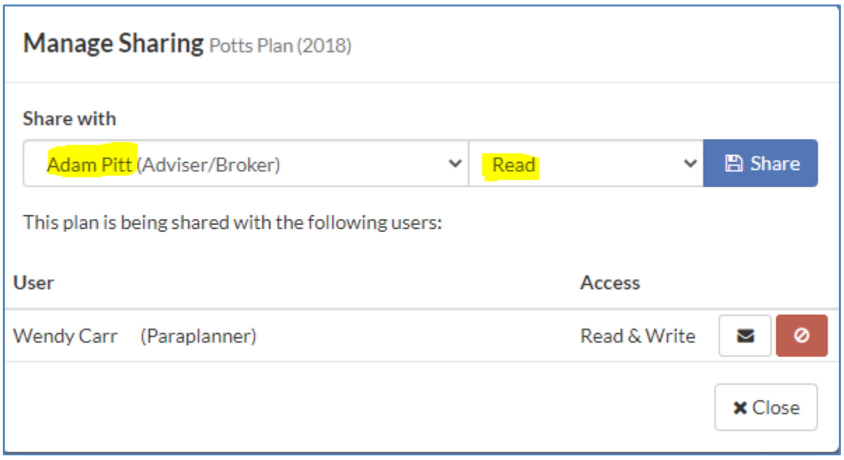
- **Read**: Requires the adviser to make a copy, transferring the IP of the Copied Plan only to the second adviser. Here the second adviser can edit the plan, rename the plan, and claim the plan as theirs. Normally this is the access recommended because you are no longer responsible for any changes made 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.

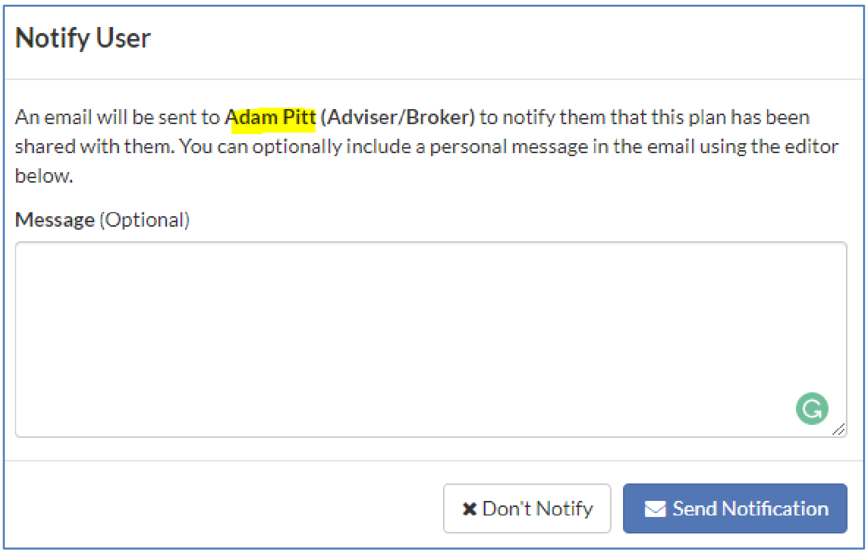
Sharing Plans

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

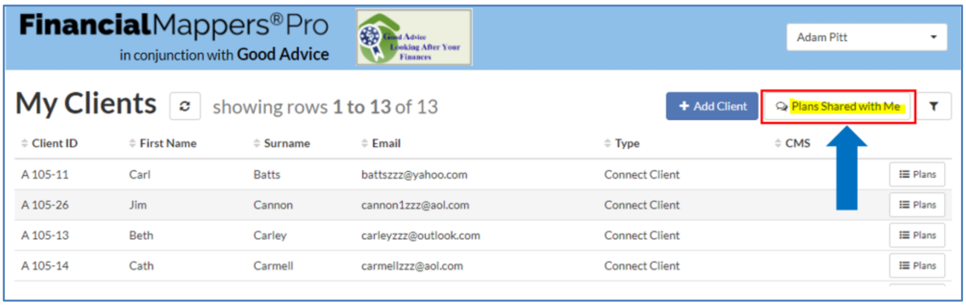
Simon does not want Adam editing his plan, so he selects the option ***Read***, which is the default selection. Note that Wendy Carr, Paraplanner, is still listed as having ***Read & Write Access***. (That sharing can be stopped after the Paraplanner has completed their work)

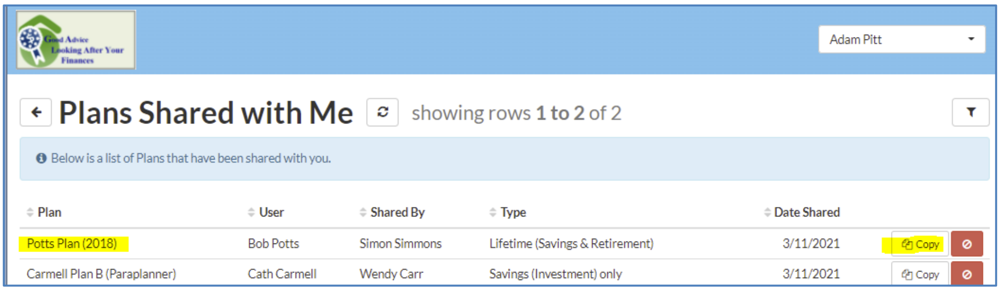


Once the ***Share*** button is clicked, the adviser can be sent a message via email.

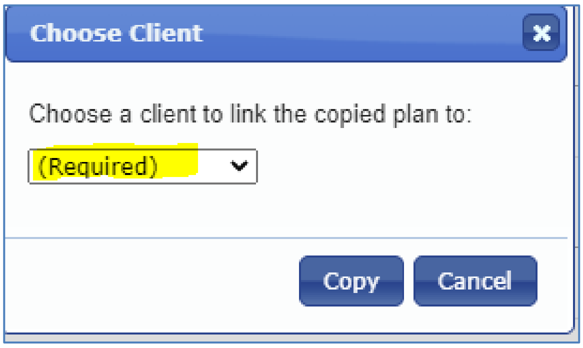


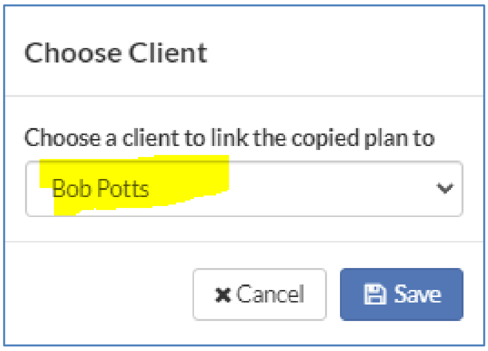
Adam Pitt, adviser, log into the software, and on the **My Clients** page, selects ***Plans Shared with Me***.



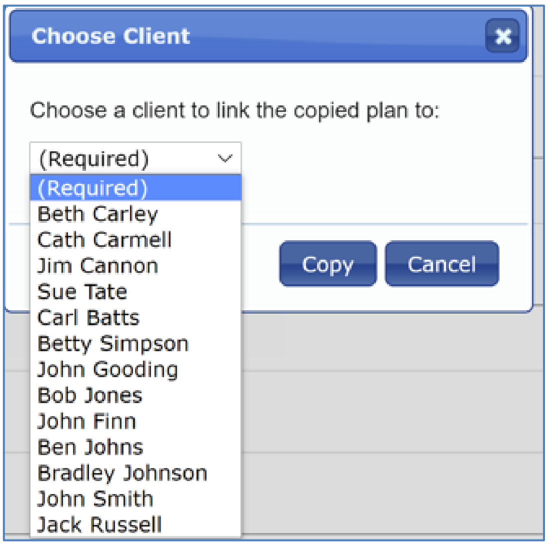


Note that when you select the Copy icon, sometimes, as in this case, you will be asked to select the client, while at other times the client is already selected.



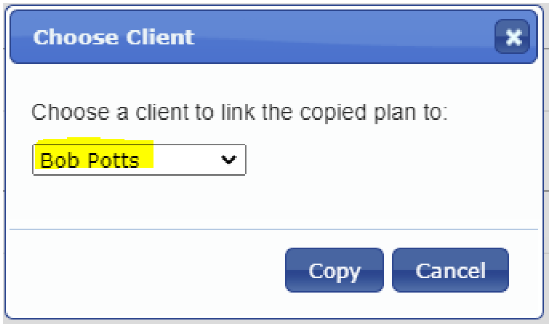


In this example, Bob Potts is not listed as a client of Adam Pitt and therefore his name is not listed.

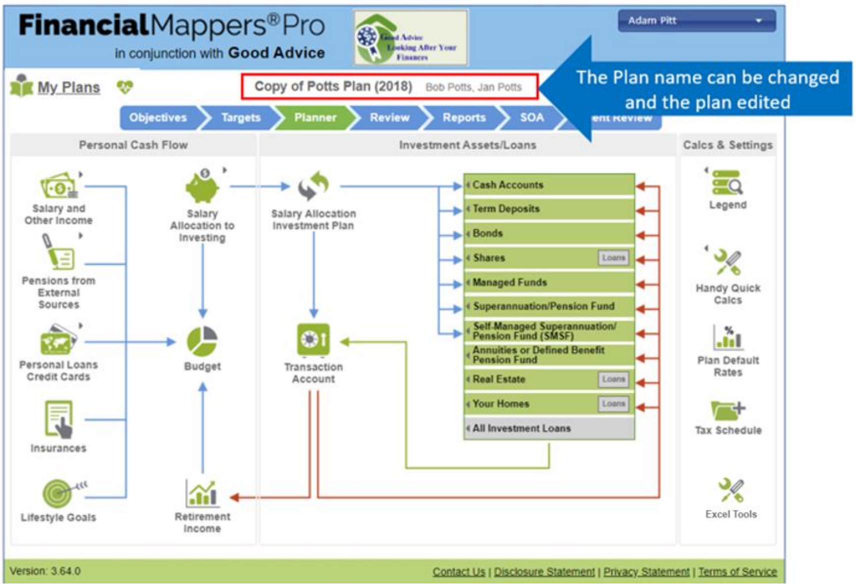


If the Client has not previously been assigned to another adviser, <u>then permission must be sought from an administrator to add the client</u>. This action will be performed by the administrator and not the adviser. In this case, the adviser is assigned to the client and the adviser now has access to Bob Potts, as he has been added to the ***Client List*** for that adviser.

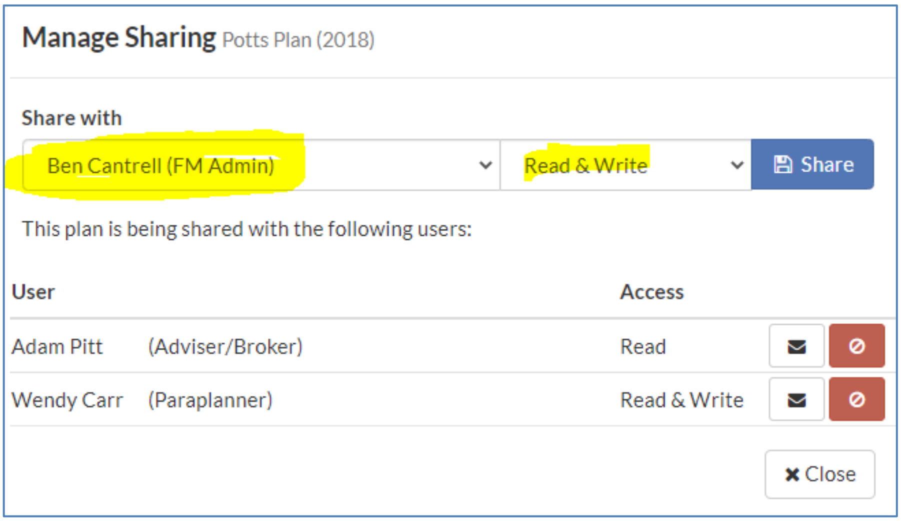
After the client, Bob Potts has been added to the adviser's list of clients, he can copy the plan.



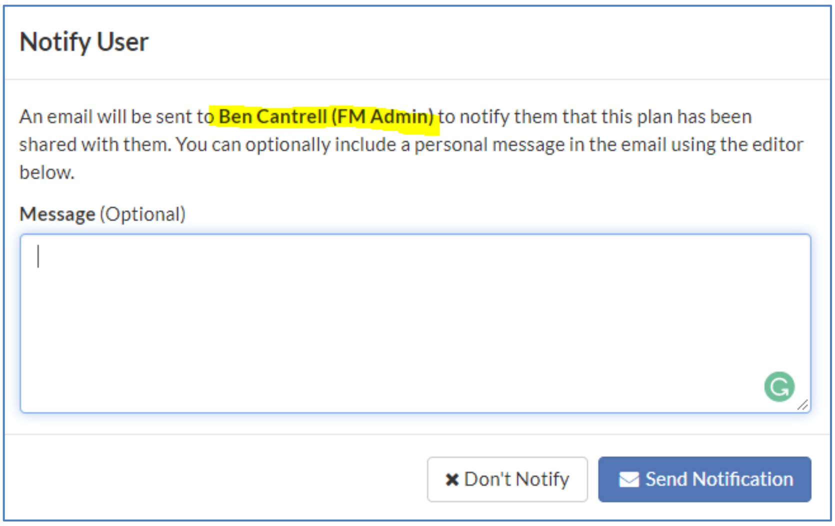
Once the copy has been made Adam Pitt, adviser, can **EDIT** the plan and make changes. The IP has now been transferred from adviser Simon Simmons to adviser Adam Pitt.



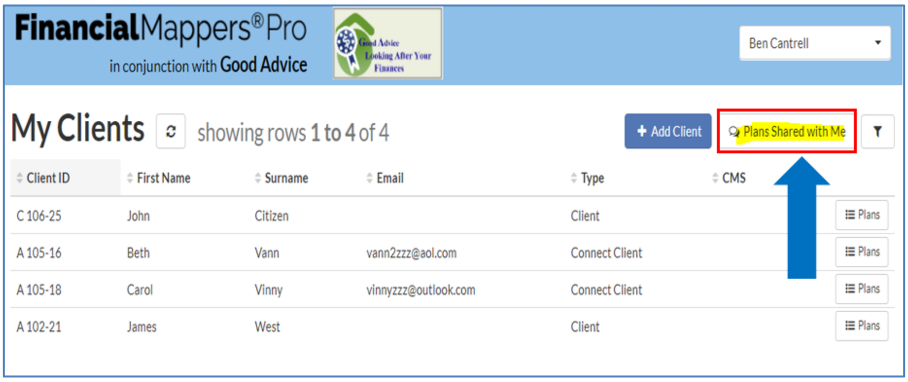
In this example, adviser Simon Simons is inviting adviser and administrator, Ben Cantrell to assist in developing the plan on behalf of Simon Simmons. That is, he is acting in the same manner as a paraplanner. Therefore, Ben Cantrell is given the access option ***Read & Write***. *(Note that Bob Potts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



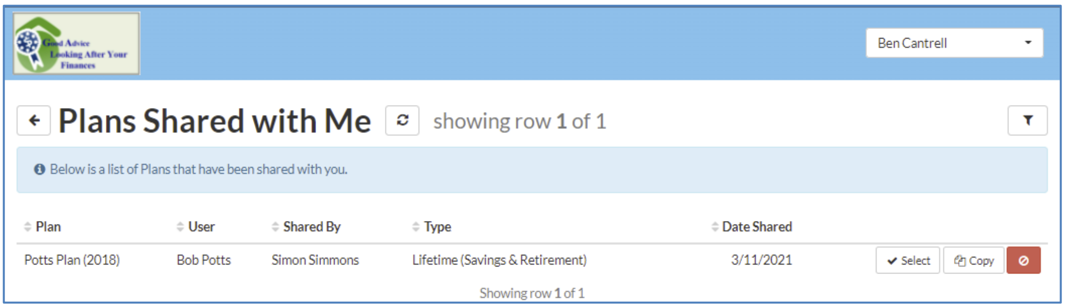
An email can be sent after the ***Share*** button is clicked.



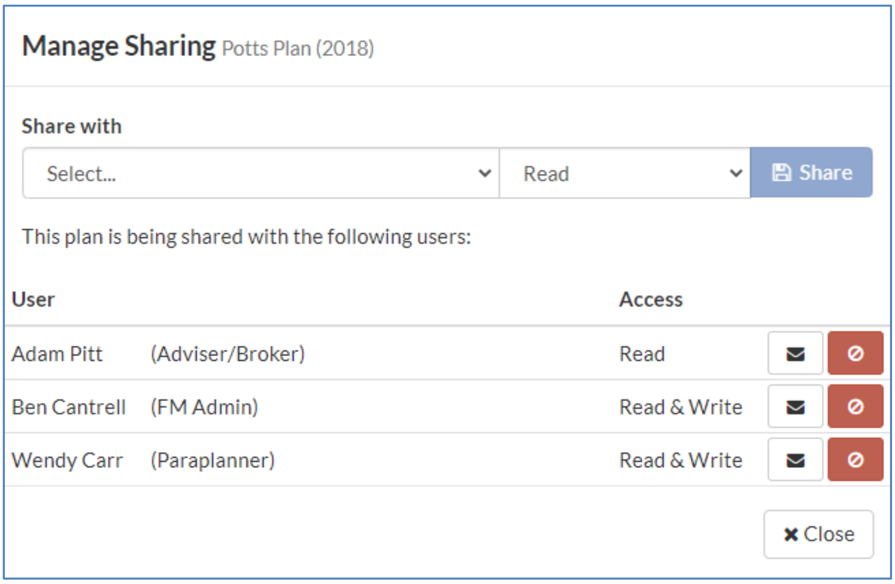
Ben Cantrell will log into the software, and go to ***Plans Shared with Me***.



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.



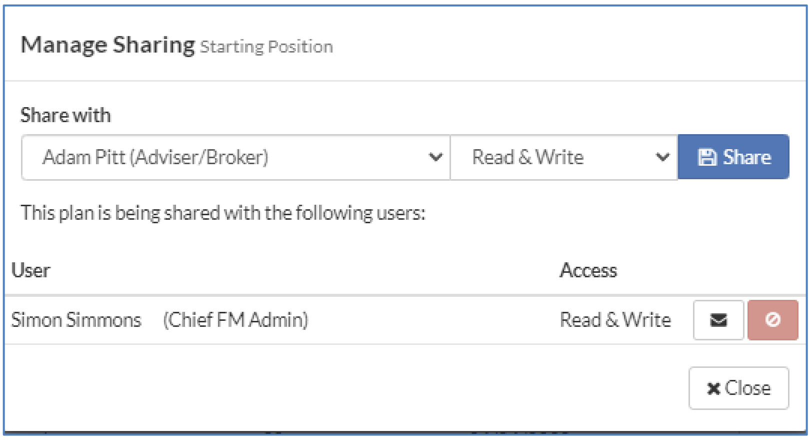
Ben Cantrell can use the "Stop Sharing" (RED ICON), when he no longer requires access. So, if we look at the ***Manage Sharing*** for the Pots Plan (2018), three people have access to the plan. The adviser can ***Stop Sharing at*** any time, by clicking on the **Red** button.



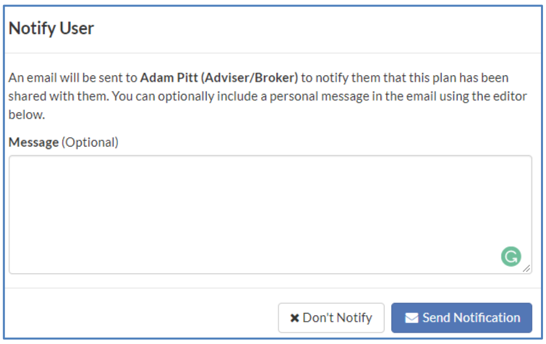
Sharing Starting Position

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.

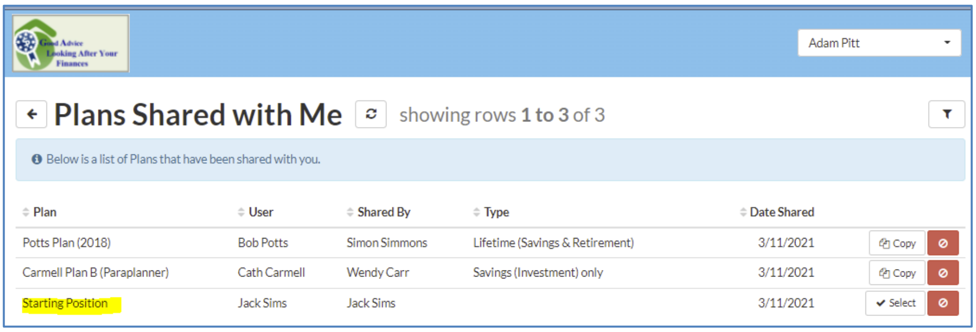
Adviser, Simon Simmons wants to share the ***Starting Position*** of (Lite) Connect Client, Jack Sims with adviser Adam Pitt.



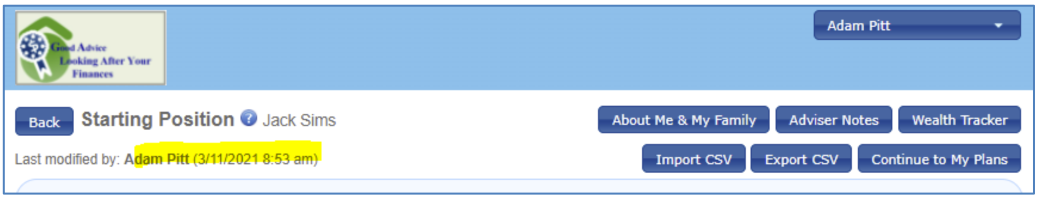
A message is sent to Adam Pitt.



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.



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.



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.

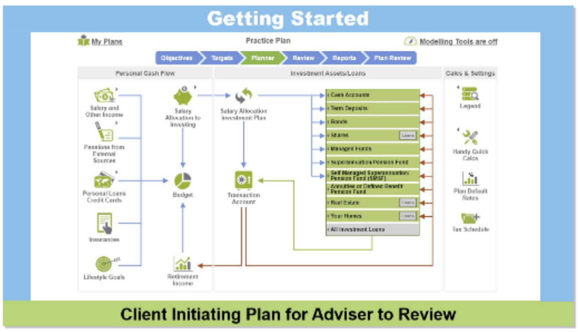
Sharing Plans between Adviser and Client

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 your can change then the length of the plan.

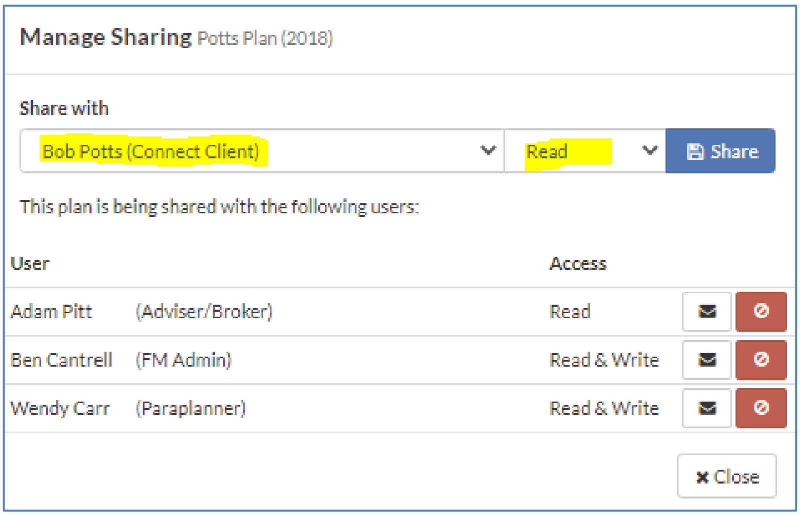
Two short videos show the difference in the ***Financial Mappers Pro QuickStart Resources*** / ***ProCONNECT Client Resources***:



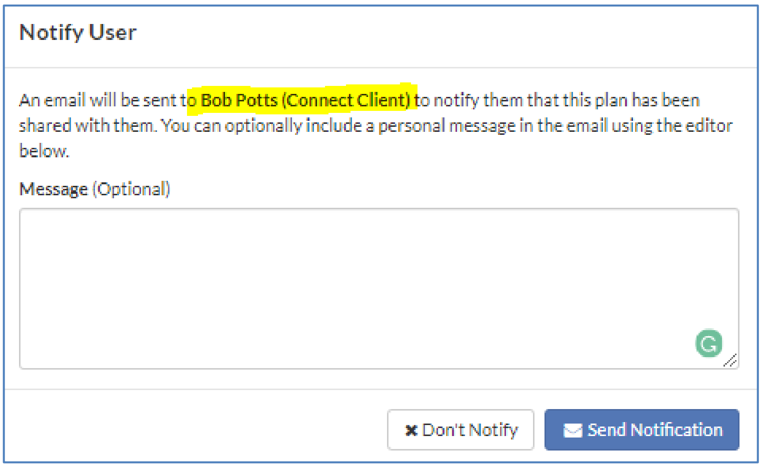
Connect Clients will have links in their version of the software to these videos, together with other supplementary videos such as *Sample Plans* and *Financial Concepts*.

Sharing Plan with Client

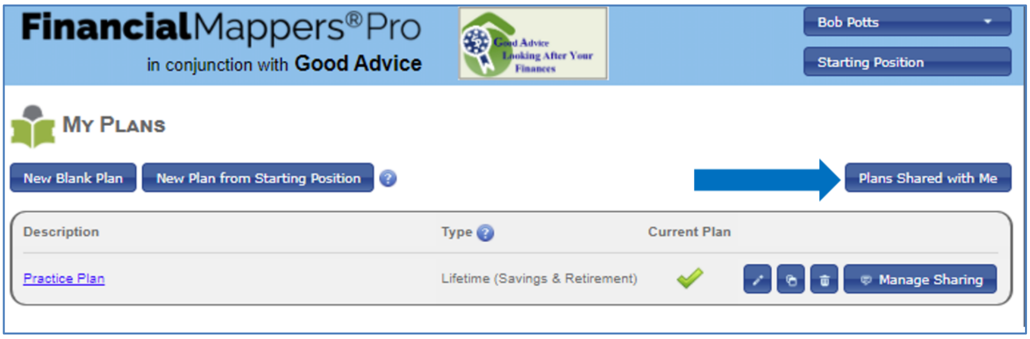
Adviser Simon Simmons wants to share the plan **Potts Plan (2018)** with the client Bob Potts. Note that Simon Simmons is already sharing the plan with advisers Adam Pitt and Ben Cantrell, together with Paraplanner, Wendy Carr. Note that the only option is the ***Read*** option. This means that Connect Clients must always make a copy of the plan before they can edit it. This then transfers the IP to the client.



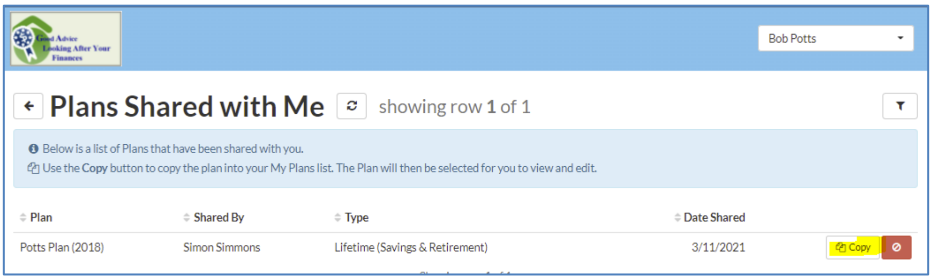
After the ***Share*** button is clicked, a message may be sent to the client.



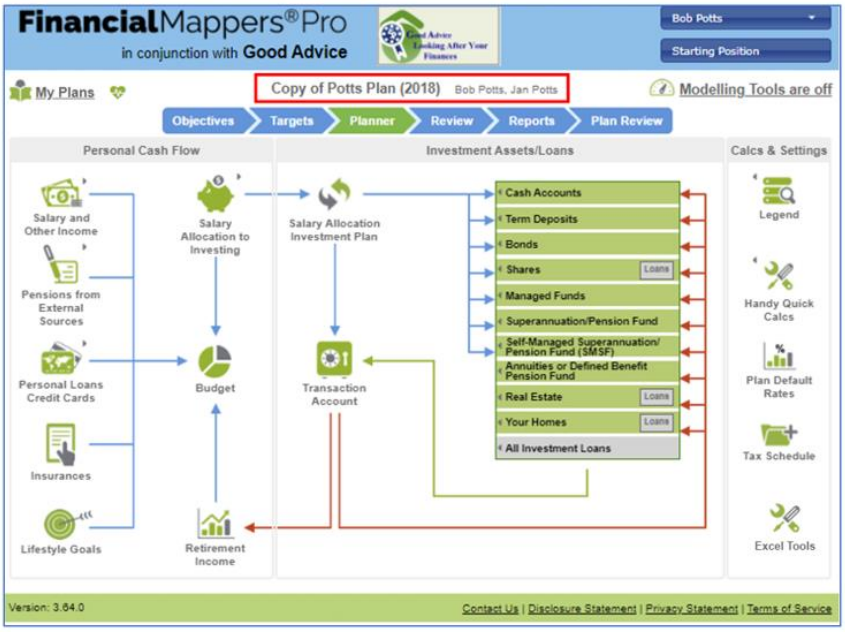
After Bob receives the message, he can log into his account and on the ***My Plans*** page, he can select the button ***Plans shared with Me***. *(Note the client's interface is slightly different from that of the Advisers. In addition, all clients, have one pre-loaded Practice Plan)*



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

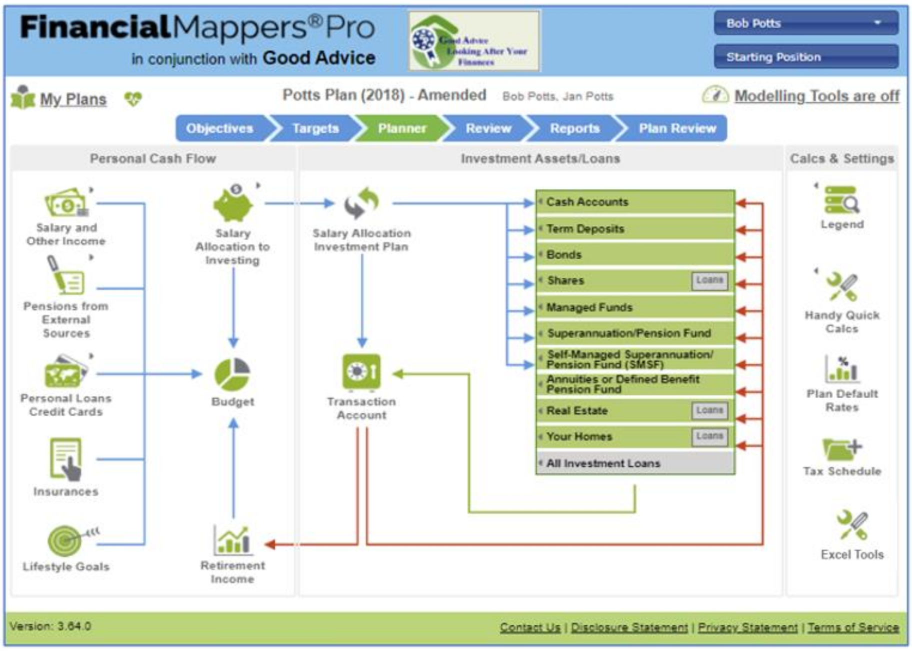


The IP is transferred to Bob Potts, who can now modify the plan as he wishes.

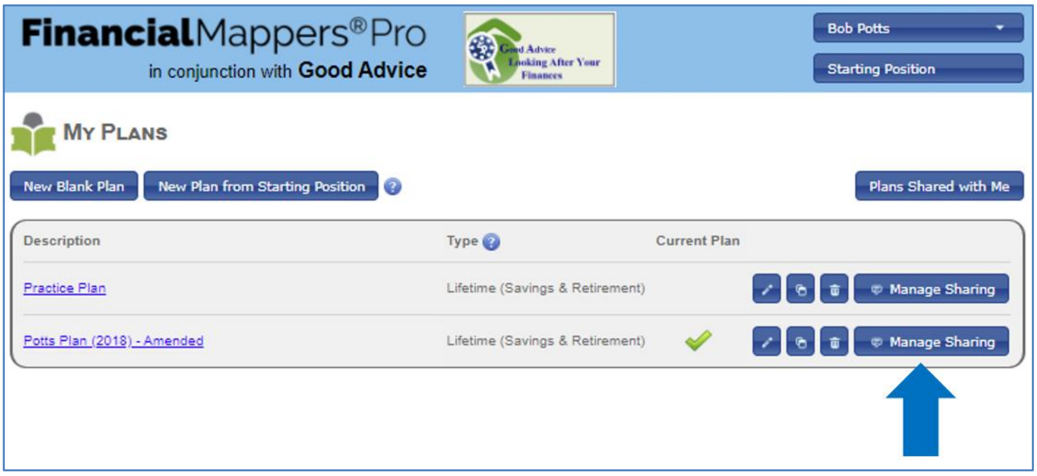


Bob can also change the name of the plan, by going the ***My Plans*** page and clicking on **EDIT** (pencil) icon.

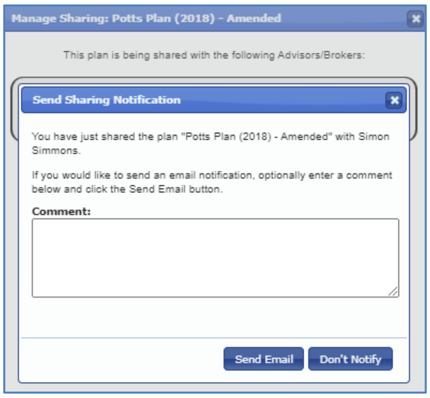
The name is changed to **Potts Plan (2018) – Amended**.



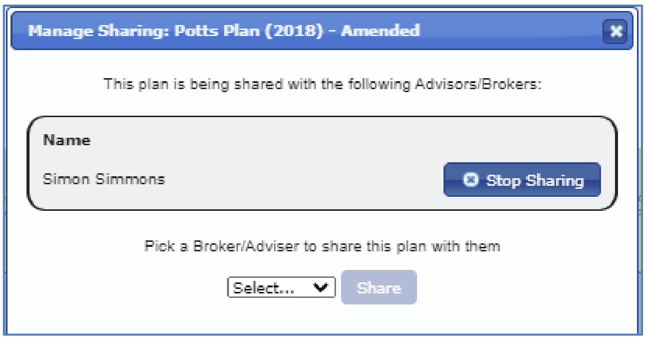
If the client wished, they could share back the amended plan with the adviser. On the ***My Plans*** page, the ***Manage Sharing*** button would be selected.



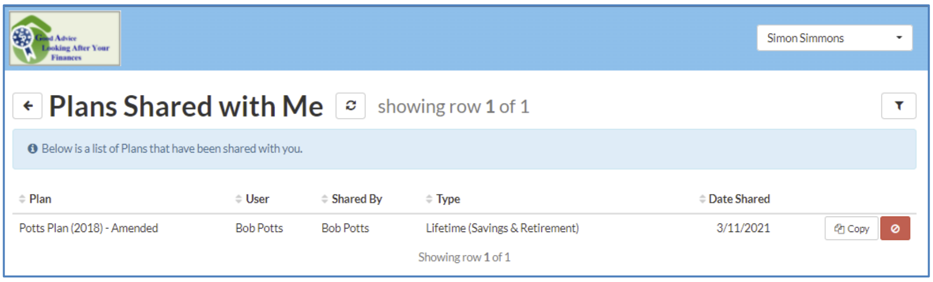
Bob selects Simon Simons from the dropdown list. *(Currently, Bob is also a client of Adam Pit, so he selects the adviser with whom he wants to share the plant)* A message can also be sent at the same time.



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.

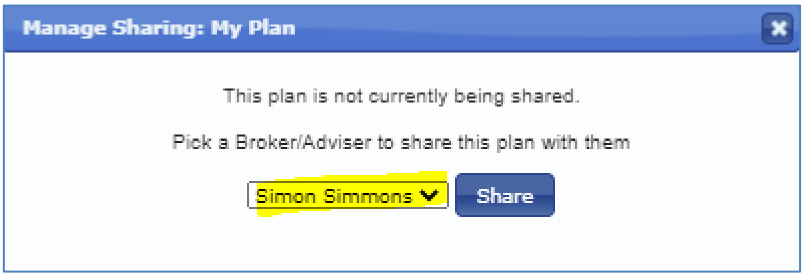
Financial Mappers provides a business model, where clients use a **Connect Financial Mappers Account** to create their plans, and then share the plan and ask for advice when required.

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.

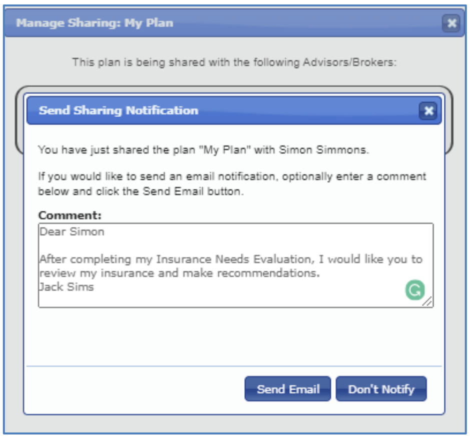
This should help your client get engaged with the planning process, start a savings plan, and reach out for advice when required. This advice can then be charged as a “fee for service” in addition to their annual subscription.

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

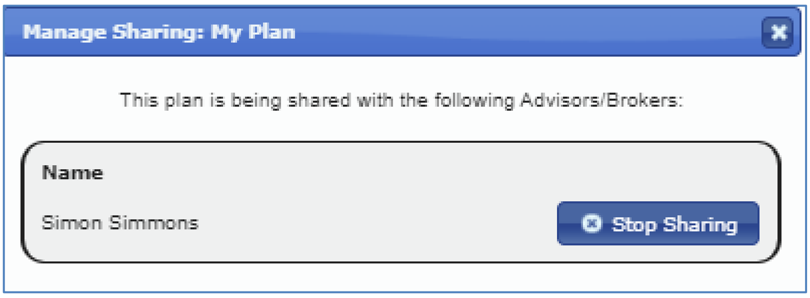
Jack selects the name of his adviser, Simon Simons, and clicks the ***Share*** button.



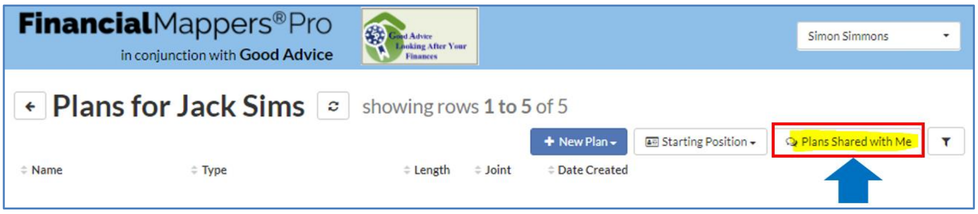
Jack sends an email with the plan saying he would like insurance advice.



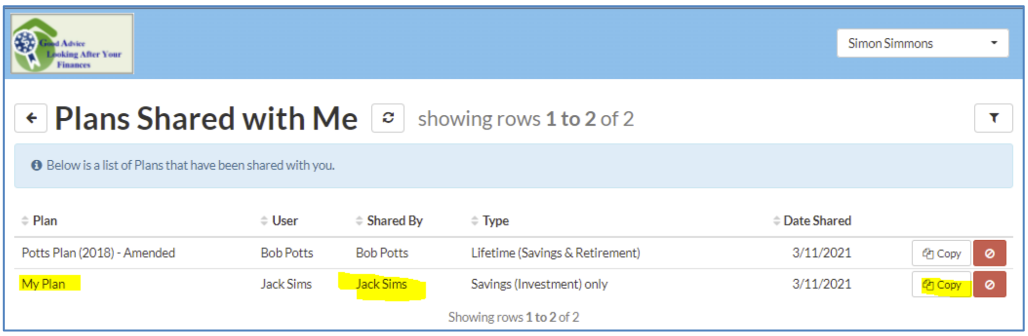
Note that Jack can stop sharing at any time.



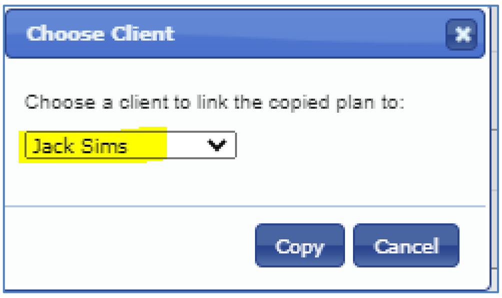
Simon Simons, adviser goes to ***Plans for Jack Sims*** and clicks on the button ***Plans Shared with Me.***



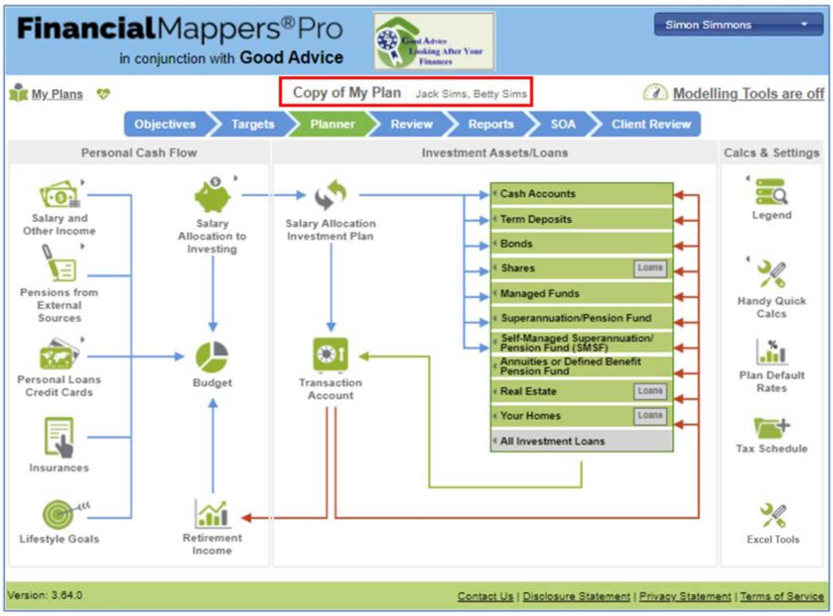
Simon makes a copy of the plan.



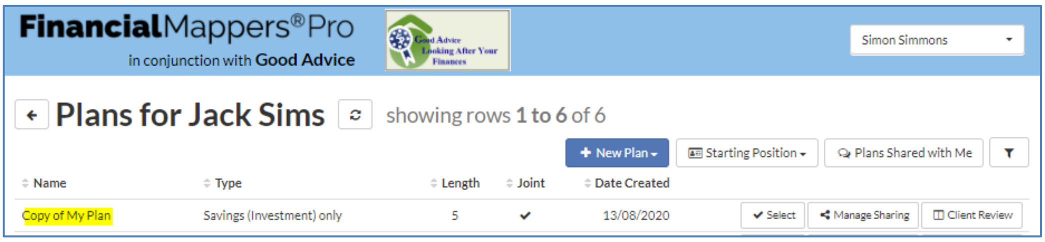
A copy of the plan is assigned to Jack Sims.

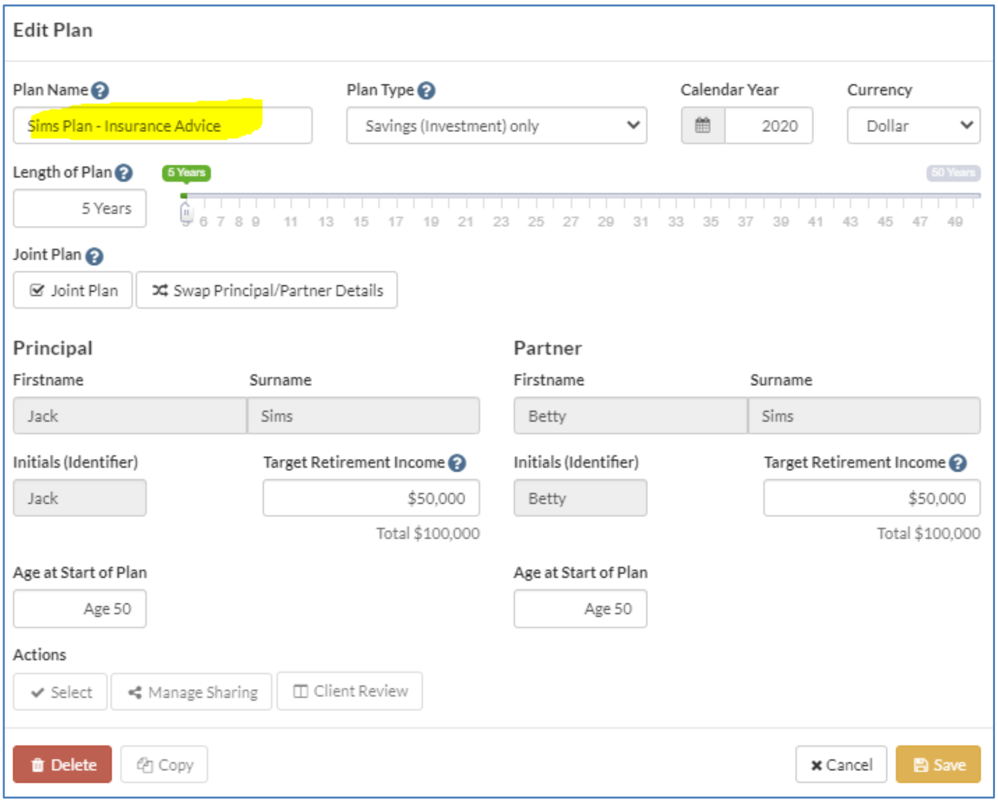


Simon Simons can now review the plan, generate the Insurance Needs Evaluation, and make recommendations, regarding the client's insurance needs.



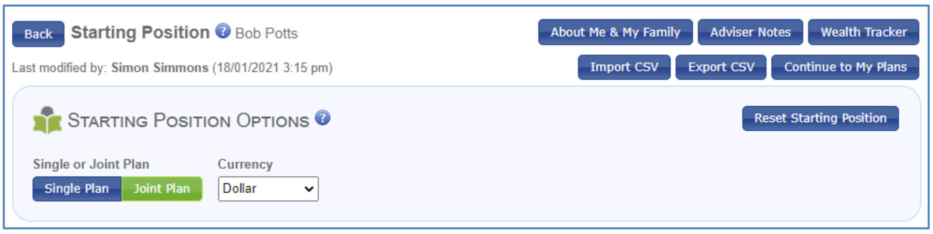
The name of the plan can be changed, by clicking ***My Plans*** and selecting the name of the plan.





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.



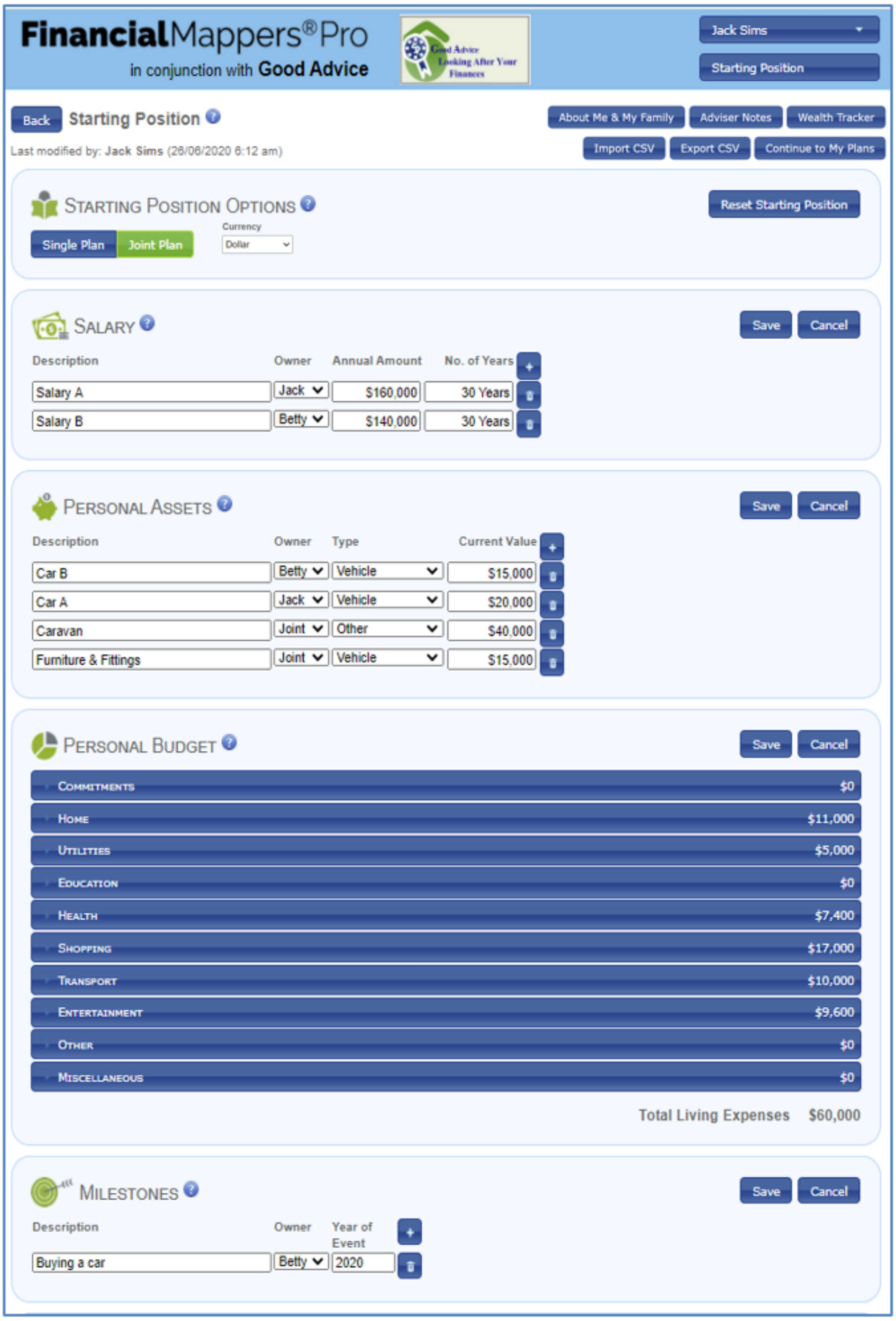
The ***Starting Position*** is a shared space, with either the client or the adviser able to update information. The last person to update the information is listed, together with the date and time. *(Note the **Wealth Tracker** and **Adviser Notes** are not visible on the Client's view of the software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


FinancialMappers®Pro
in conjunction with Good Advice
Simon Simmons
Back
Starting Position
Jack Sims
Last modified by: Jack Sims (26/06/2020 6:12 am)
About Me & My Family
Adviser Notes
Wealth Tracker
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.


FinancialMappers®Pro
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 (26/06/2020 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

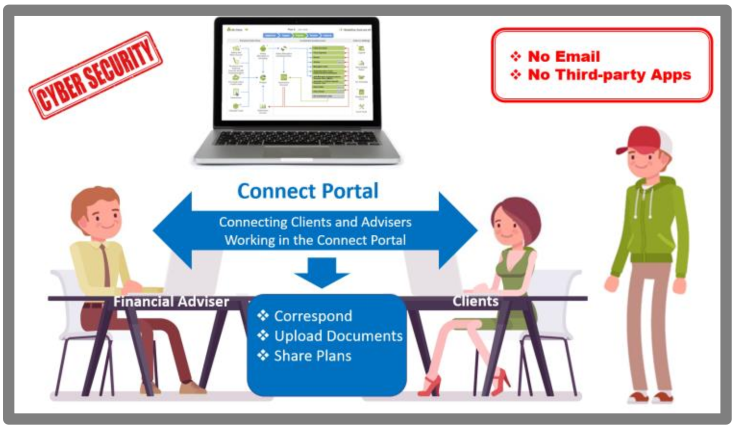
We would like to know if we are on track to be self-funded retirees

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.

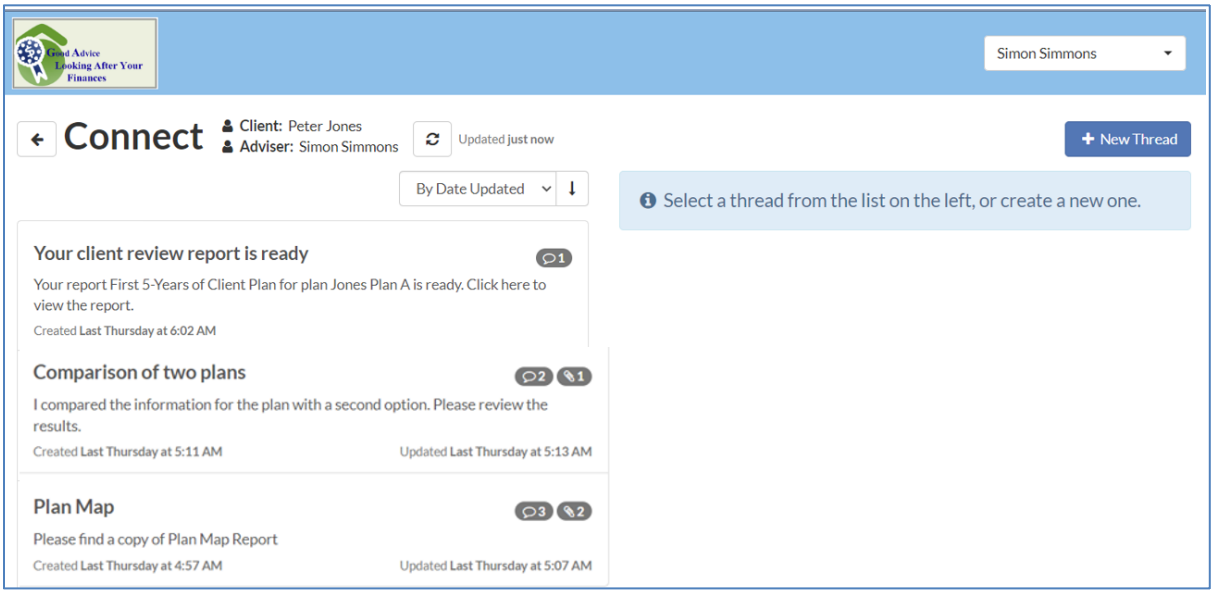
Financial Mappers is one of the first companies to fully address this issue.



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.

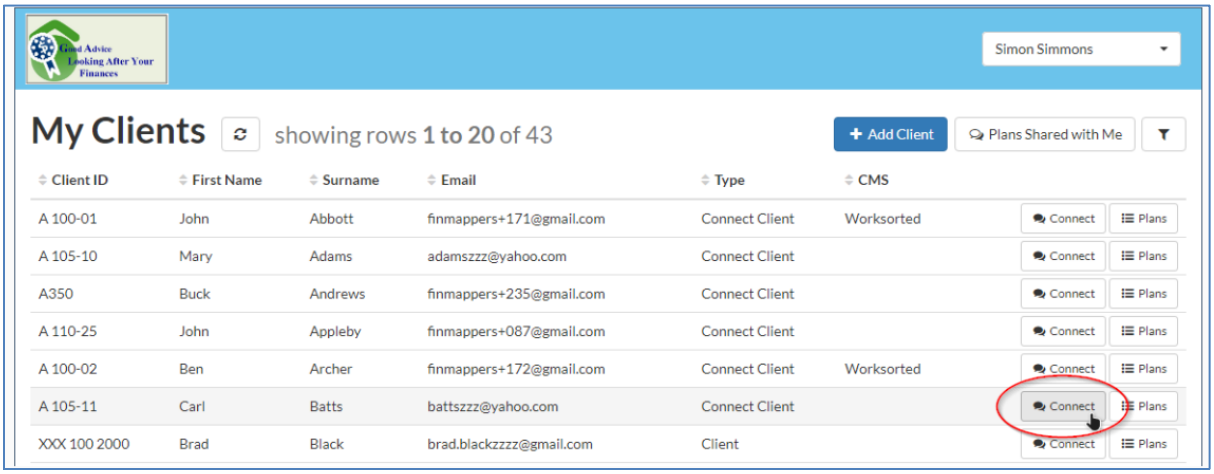
There are no fees for using the *Connect Client* feature and it is recommended that you take advantage of this facility. Advisers can continue to have Clients, that are not connected, but any exchange of information will need to be through email. It may be that you already have a secure email service 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 to locate. Threads can be ordered by **Date Updated** or **Date Created**. This is a set of three threads

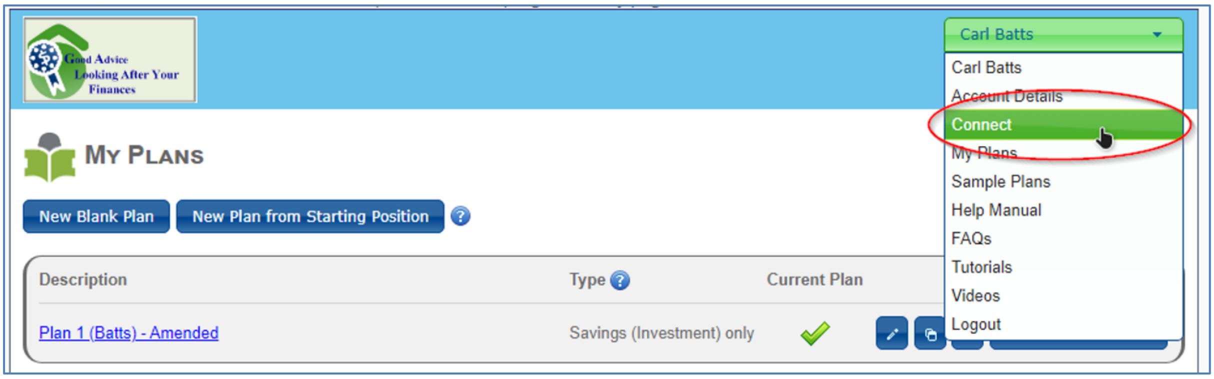


The Process

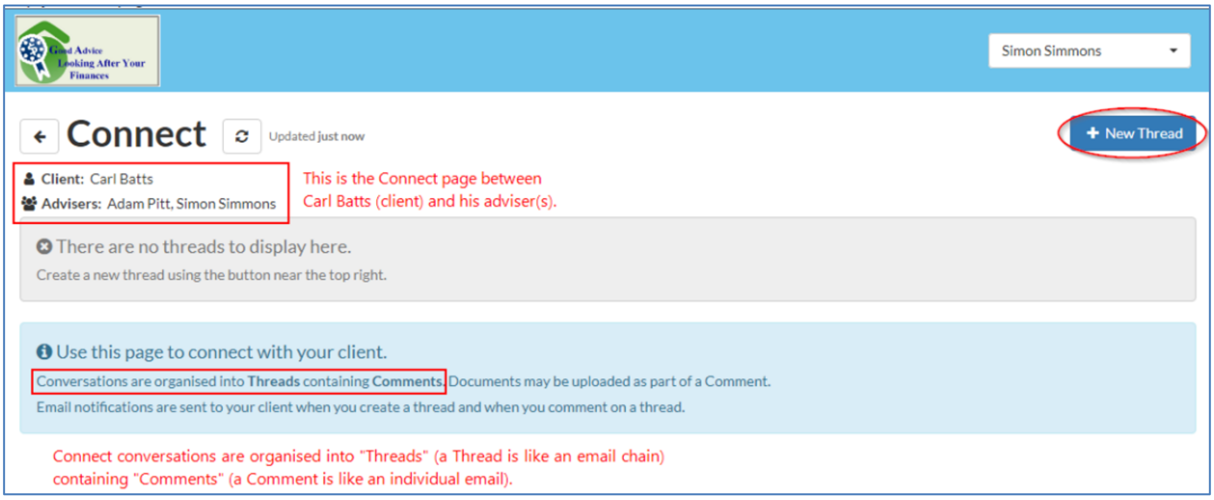
Adviser selects the ***Connect*** button to right of the client's name.



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

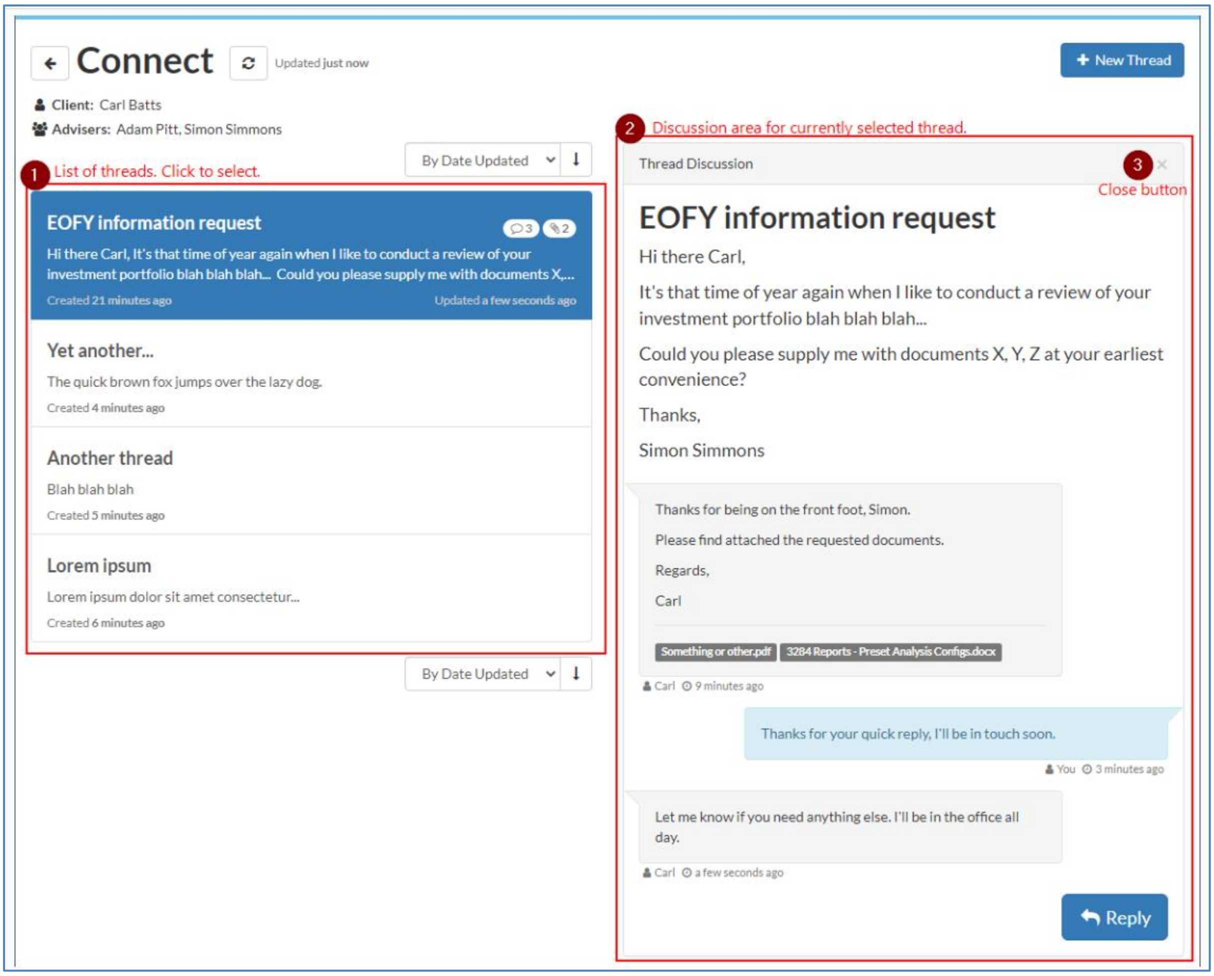


Here is an empty ***Connect Page*** for the adviser, Simon Simmons and client, Carl Batts.



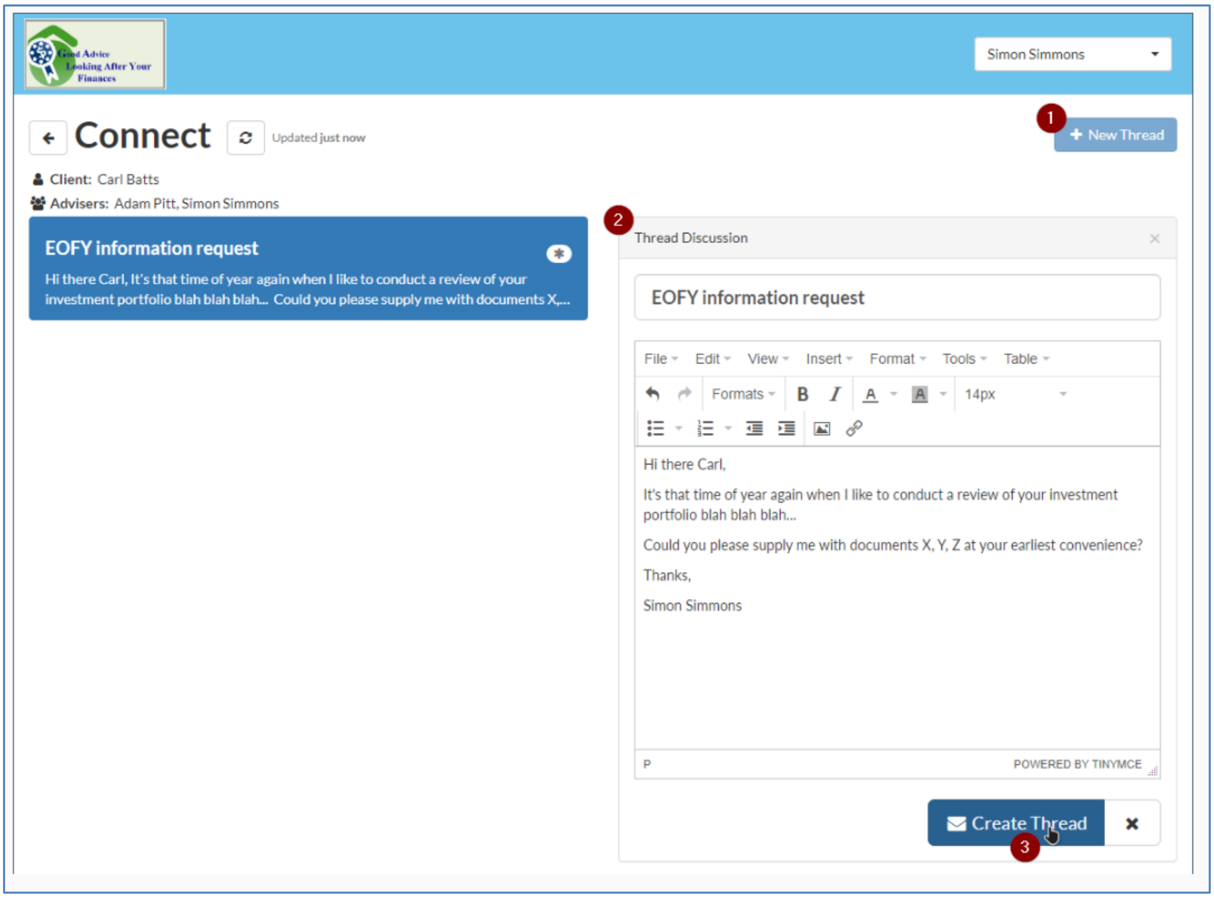
Once you start creating threads, they will be listed on the left-hand side of the page.

- 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.

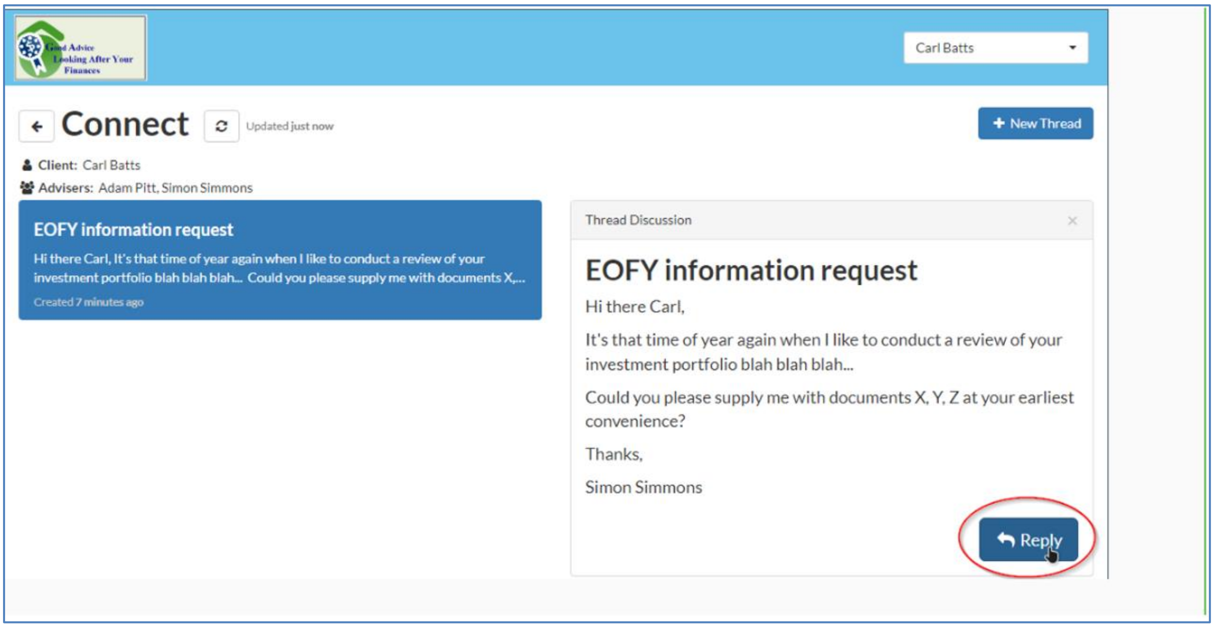


To start a conversation, either the Client or one of the Advisers can create a **New Thread**. The other party is notified by email.

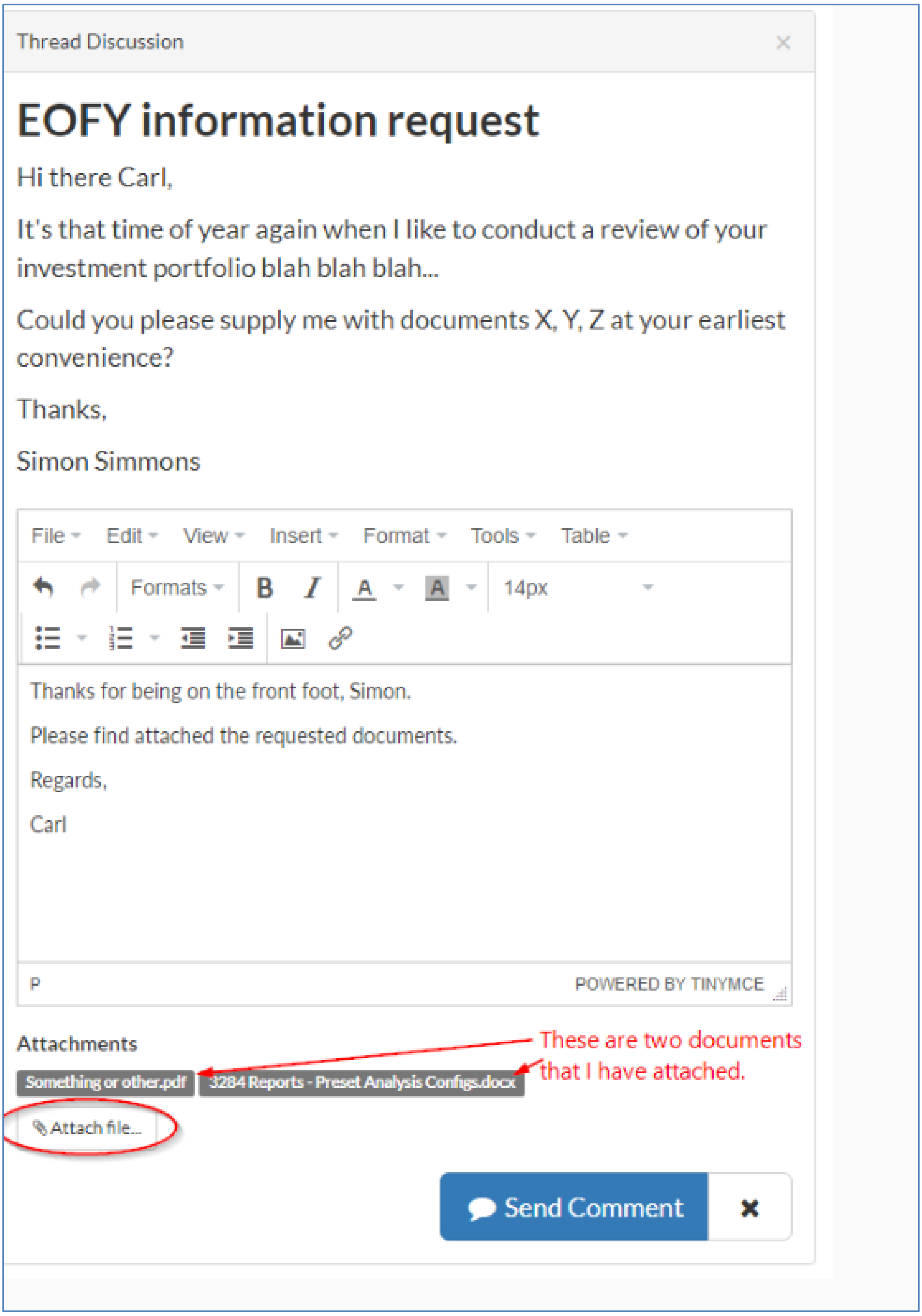
- Click the ***New Thread*** button.
- Write a subject and message.
- Click the ***Create Thread*** button.



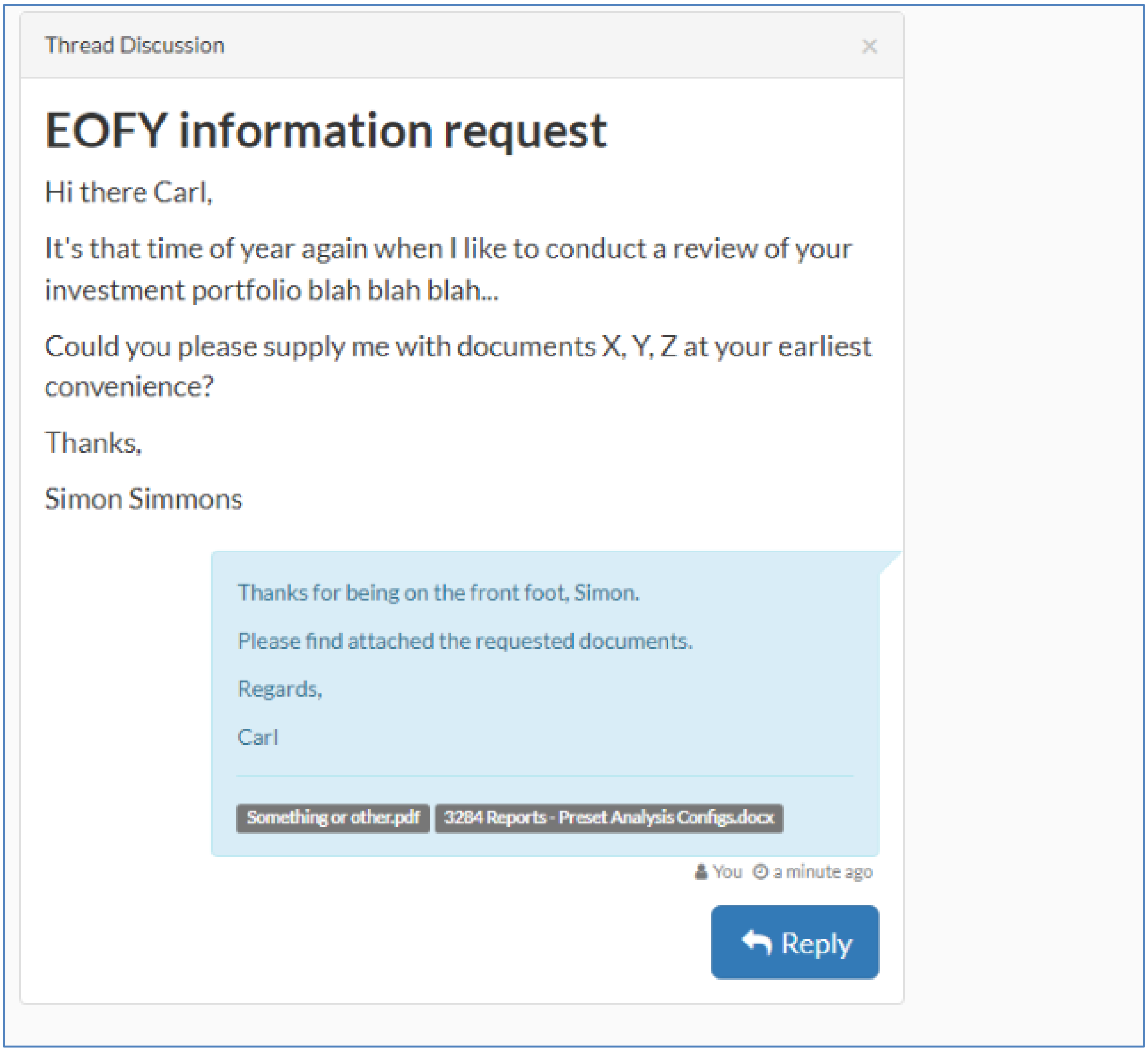
Once the thread is created, Carl is sent an email notification. Both parties can see the thread on their ***Connect*** page and can reply to it. To reply to a thread, click on the ***Reply*** button.



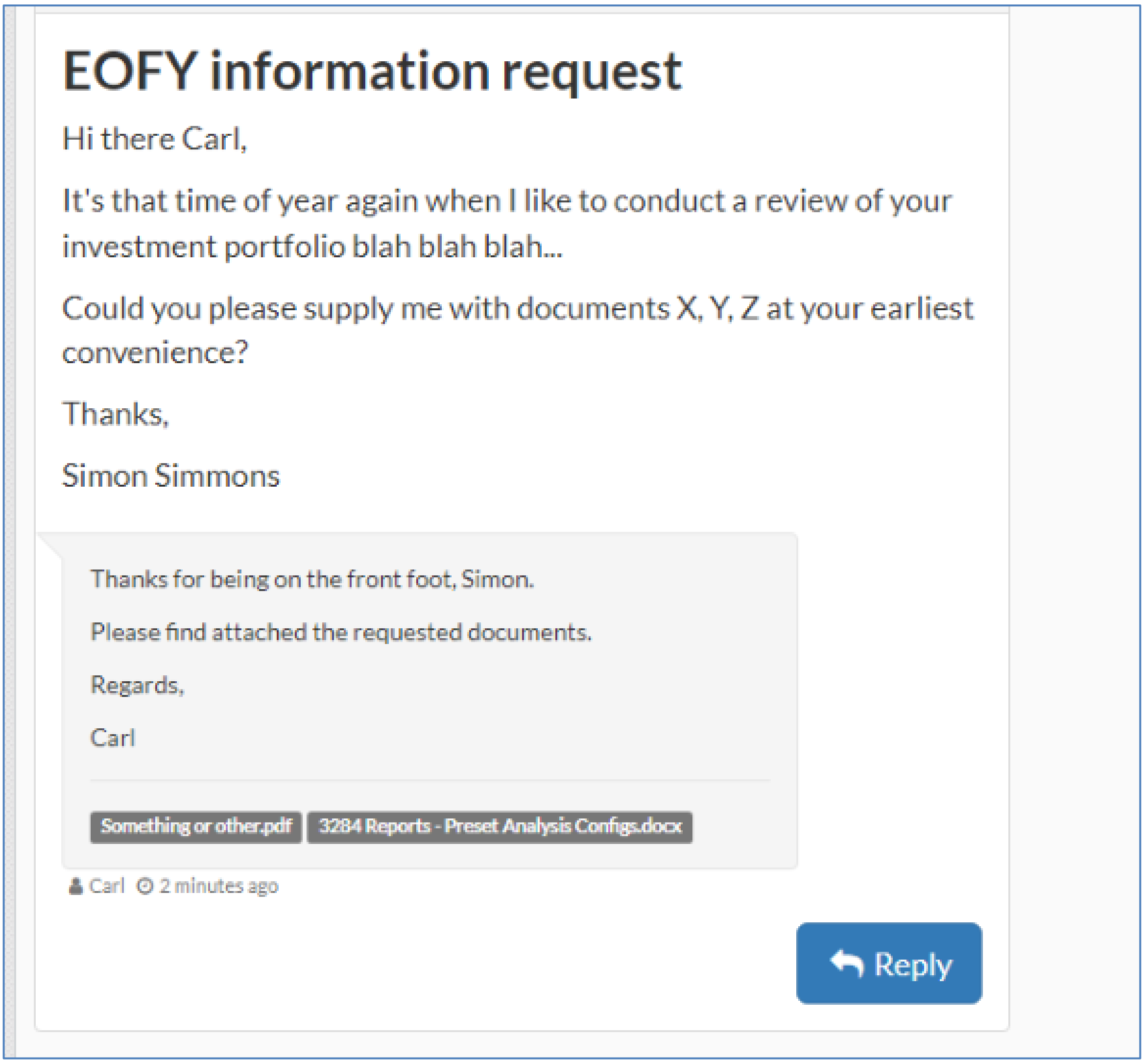
You can type the message and attach documents using the ***Attach File*** button.



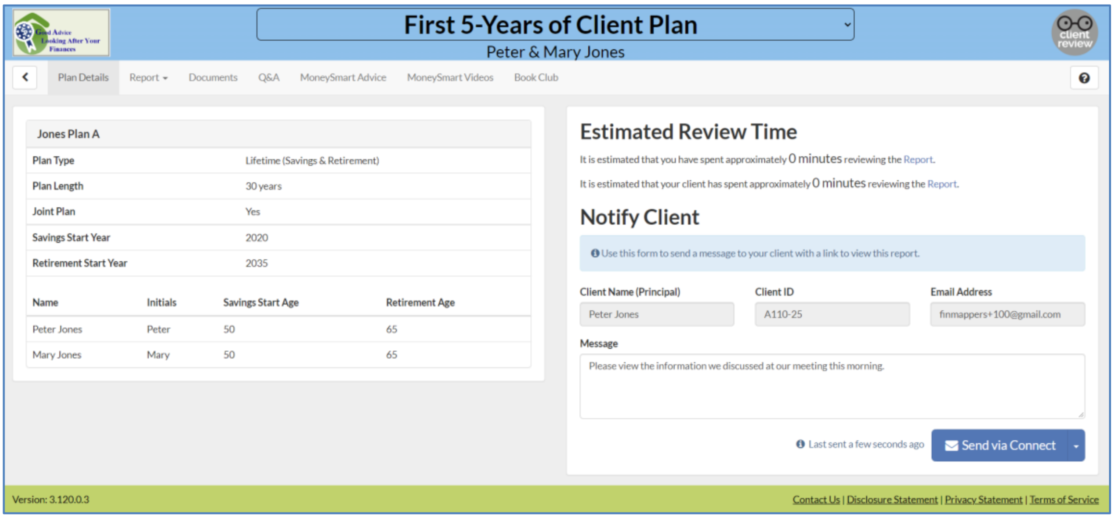
Once the comment is saved, it shows in a blue or grey bubble in the ***Thread Discussion*** area. Blue equals your comments and grey equals someone else's comments. You can also see the name of the person who sent a comment in the small text just below the comment. This is the Client (Carl) view.


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:



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.



The client receives an email.

If this email does not display correctly, please click here to view the online version

A new comment has been posted in Connect

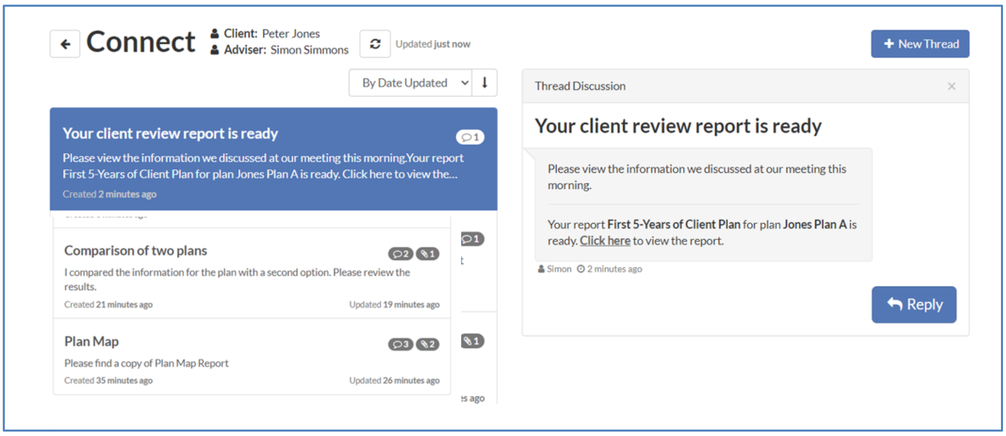
Simon Simmons commented in a thread in Connect.

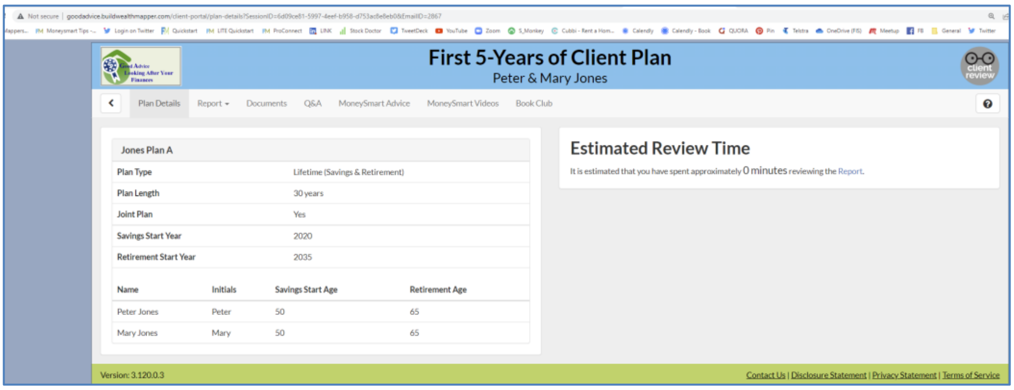
Client: *Peter Jones*
Thread: *Your client review report is ready*

To view the thread and its discussion, click the link below.

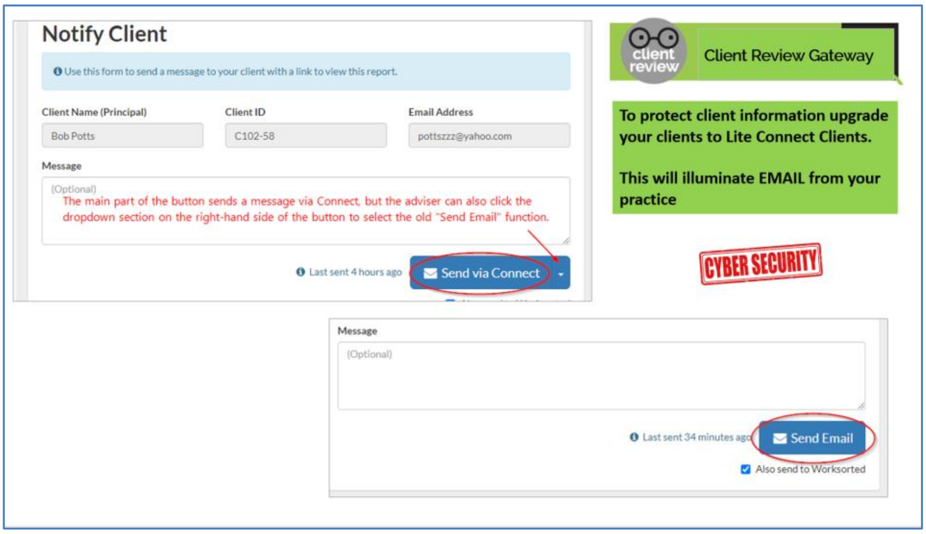
http://goodadvice.buildwealthmapper.com/connect/?clientTenantUserId=407&selected=25-31

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.



Notify Client
Use this form to send a message to your client with a link to view this report.
Client Name (Principal)
Bob Potts
Client ID
C102-58
Email Address
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

Glenis Phillips B Ed, SF FIN
Designer of Financial Mappers
Author of Map Your Finances
Founding Director of Plencore Wealth Ltd

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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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