CALCULATE • PLAN • EDUCATE

Web-based, Modular Financial Planning Software

FreshPlan.ca

FreshPlan

SUPPORTING CANADIAN ADVISORS

FreshPlan software is designed to support Canadian financial service professionals by providing convenient tools to help them analyze, explain and offer historical context to reinforce recommendations to clients and prospects.

Since 1996, Ativa Interactive has been developing software, financial calculators and infographics for financial advisors, professionals, and corporations.

CALCULATE

Full Financial Spectrum

Calculate scenarios across a full spectrum of financial planning key areas with over 75 calculators.

PLAN

Goals-based Planning

FreshPlan is so easy to use it allows advisors to complete a full financial plan in 30 minutes and flexible enough for single needs analysis when a full plan is not needed.

EDUCATE

Sharable Concepts

Choose from a growing library of visual, shareable infographics covering the concepts that clients need most when they are making important financial considerations.

Intuitive, Flexible and Robust

FreshPlan combines calculators, with powerful infographics and planning modules to provide advisors with a visual, easy-to-use, time saving planning and education tool.

Reports and output are personalized with Advisor name, contact information and company logo. FreshPlan for Enterprise offers additional opportunities for customization and user reporting.

Shareable Infographics

Choose from growing library of over fifty infographics that illustrate a vast array of financial planning topics.

Engaging graphics help clients understand complex concepts and events quickly and clearly.

Stay Connect Year-Round
Infographics are a valuable tool to help stay connected to clients and prospects all year. Current and topical, each infographic is easy to share on their own or as part of a financial plan.

INFOGRAPHICS INCLUDE

- RRSP vs TFSA
- Timely Federal Budget Summaries
- Tax Credits & Deduction Summary
- The Financial Planning Process
- Federal Programs (CERB, CESG, etc.)
- Important Money Dates & Facts
- Retirement Readiness
- and many more

Personalized for Sharing
Each are personalized with the Advisor name, logo and contact information.

www.FreshPlan.ca

Cut the Learning Curve

FreshPlan is both powerful and intuitive so Advisors can spend less time learning software and more time with their clients.

Calculate, educate and create reports in minutes instead of hours using visual calculators and infographics that clients and prospects will understand.

Ease of Use
The visual interface and intuitive workflow means advisors are up in running immediately. Access anywhere you have internet. FreshPlan is fully responsive, secure and works seamlessly on your phone, tablet, iPad, laptop or desktop.

Data Security
FreshPlan security protocols are standardized with a service architecture designed for confidentiality, integrity, and secure availability of your data.

Additional Enterprise Features

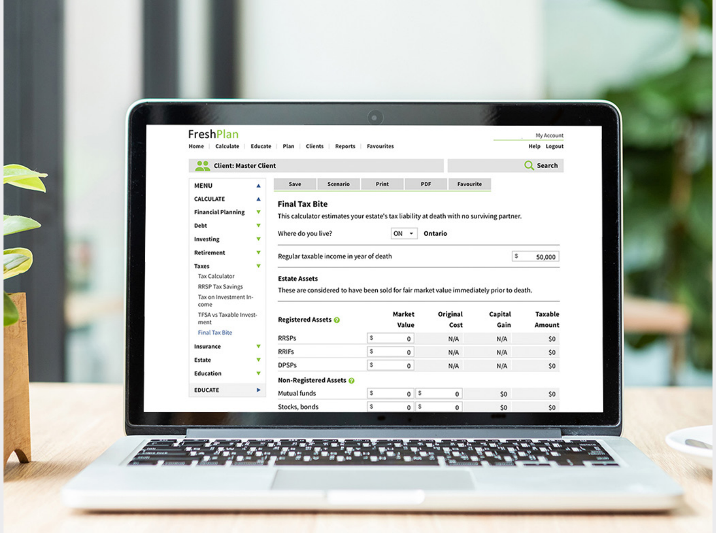
FEATURE CONTROL
Powerful user profiles offer greater control over content access based on Advisor credentials.

CREATE TEMPLATES
Streamline workflow by creating planning templates for advisors to as a base for individual clients.

TRACKING & REPORTING
Extensive usage tracking and reporting allows insight into the frequency, content, and features with which users are accessing.

CUSTOM CONTENT
Adding unique content specific to your enterprise will improve Advisor usage and strengthen your brand.

Single Sign-on Options
In addition to adding more convenience for users, SSO offers more opportunities for additional customization.



Consistent, Compliant Planning

Ensure financial planning engagement with clients is consistent whether planning from home or in the office with visual, easy-to-use modules.

Easily calculate, explain and reinforce complex financial concepts with a secure, online app accessible from any browser or device.

Modules support key areas of financial planning:

FINANCIAL MANAGEMENT

Understanding a client's current financial situation is the foundation where holistic financial planning begins.

INVESTMENT PLANNING

Advisors are able to map out investing strategies to help clients meet their long and short term goals, according to their comfort level with risk.

RETIREMENT PLANNING

Robust retirement modules allow Advisors to walk clients through scenarios to help them plan and save for the future. Powerful calculators illustrate results visually with the ability to drill down into accumulation and distribution tables.

PROTECTION

Streamlined modules walk advisors through each step of analysis for client needs, to assist important conversations about life, disability and critical illness insurance.

ESTATE PLANNING

Considerations are addressed in planning for an efficient transfer of wealth while protecting family members.

EDUCATION PLANNING

FreshPlan modules estimate the future costs of education, illustrates saving tools, grants, and offers scenarios re: RESPs.

Planning Support

Powerful planning modules are accompanied by additional easy-to-understand supports

- Personalized Title Page
- At-a-Glance Summary Dashboard
- Disclaimer
- Letter of Engagement
- Powerful Scenario Feature
- Summary of Recommendations
- Assumptions for Each Module
- Supporting Infographics
- Accumulation/Distribution Tables

Connect to Discover More!

FreshPlan
by Ativa

REQUEST A FREE DEMO

Try FreshPlan for yourself.

TAKE A VIRTUAL TOUR

We'll walk you and your team through a personalized virtual tour.

CONTACT

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