PROGNO

PROGNOADVISOR

Online Financial Planning Platform

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PrognoAdvisor brings together the Client, Advisor and Financial Planner on a single platform. Most often financial planning softwares follow either goal based or cash flow based model. Each of these models have pros and cons. **Progno**Advisor combines best of the both worlds to deliver the most **practical** financial plans. It helps to generate plans **10x faster** and increases advisor **efficiency** by **4x**.

PrognoAdvisor comes with a host of **unique features** that makes its one of the most **flexible** and **user friendly** software.

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Functionality

- **Comprehensive –** Advice on Budgeting, Debt Management, Goals, Investments, Savings, Life Insurance, General Insurance, Taxation
- **Unique algorithm –**Integrates **cash flow planning** and **goal planning** to ensure that the advise is practical
- **Risk Profiling** – Scientifically built Risk Tolerance Test which combines the user’s answers to the questionnaire and financial situation to determine the Risk Profile
- **Asset Allocation** – 4 asset allocations for 4 time horizons for each risk profile. The Rate of return of the asset allocation of the goal time horizon used in the goal calculation
- **Client Onboarding –** Signing up, KYC Verification, Payment Gateway, Invoicing, Data Submission
- **Aggregation & Disaggregation –** Current Assets are allocated as per the asset allocation for the goal and aggregate asset allocation is arrived from that. Same is the case with portfolios

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- **CLNA** – Life Insurance requirement is arrived at using Capital Liquidity Need Analysis Method
- **Projections** – Income, Expenses, Cash flow, Debt, and Goal Projections

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Features

Document Folder – Share documents between Advisor & Client

Collaboration – Client can Collaborate with Advisor online in data entry, data confirmation and data mapping.

Currency Agnostic – Client can submit data in any currency and get output in preferred currency

80+Strategies - Financial Planner can configure 80+ strategies to generate the most practical plan

PDF Print – Client can see the plan online as well as take a PDF Printout

User Interface – Simple and easy to submit data forms and output in graphs & charts for easy understanding

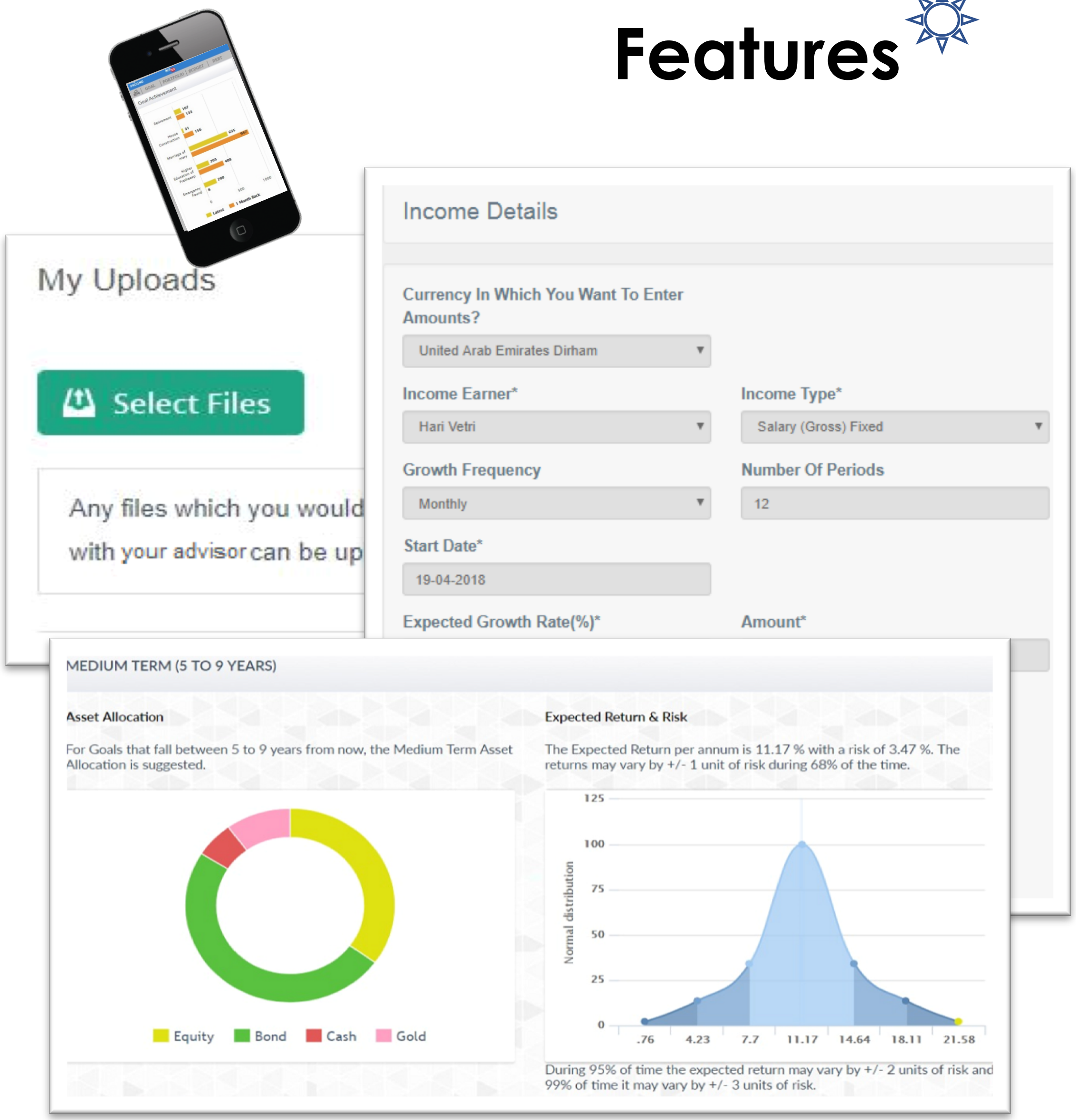
Mobile Responsive – Users can open the web app in mobile as use it as similar to a mobile app

Advisor Login – Advisor can view the client screens, can get the live status of clients, chat will clients

Admin Login – Admin can upload asset allocations, product masters, set default values, get business intelligence and create business users

Date Feeds – EOD stock prices, MF NAV and Currency Rates are fetched using webservices. Stock & MF fundamentals are optional

And many more !



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