

MPlan for Financial Planners

FEATURES

- Client-centered financial planning suite
- Save/Archive multiple sessions
- Personalized advisor center adds personal touch to reports
- Broad range of planning tools covering investments, retirement, borrowing, goal-setting, needs analysis and strategy comparison
- Online/Offline capabilities
- White labelled – customize with your company branding and preferences

BENEFITS

- Build your own customized suite of tools from a choice of over 30 calculators
- Provides a platform to ensure consistent advice is offered companywide
- Export data to external systems
- Web-based - can be accessed from anywhere
- Individual calculators tied to a common centralized client hub

CUSTOMIZED FINANCIAL PLANNING HUB

MPlan is a centralized, flexible financial planning hub that provides the means to generate sales leads, convert prospects to clients and draw additional revenue from existing clients.

Whether deployed on your public website, or through your company intranet as an advisor toolkit, MPlan has the breadth of functionality to tailor your suite to meet the financial planning requirements of your organization.

The image displays two screenshots of the MPlan software interface. The top screenshot is the 'Scotia Investment Borrowing Reality Check' tool. It features a navigation menu with options like 'About Leveraged Investing', 'Is It Right For You?', 'How It Works', 'Risks', 'Taking Action', 'Print', and 'Exit'. The 'How It Works' section is active, showing a bar chart comparing 'Invest Monthly' and 'Borrow To Invest' scenarios. The chart shows that investing \$14,732 monthly results in a value of \$22,124, while borrowing \$5,000 results in a value of \$17,124 after loan repayment. The 'Borrow To Invest' scenario includes a green segment representing 'With tax deduction on loan interest' and a blue segment representing 'After loan repaid'. Below the chart, a table lists key metrics: Investment Time Horizon (15 Years), Investment Rate of Return (8.500%), Loan Rate (7.500%), You Invest (\$2,500), Mutual Fund Collateral (\$31), Monthly Investment/Loan Payment Amount (\$114,732), Your Investment Grows To (including collateral) (\$22,124), Invest Monthly (\$114,732), Borrow To Invest (\$5,000), Value Of Investment (\$22,124), Loan Amount (\$5,000), Investment After Repayment (\$17,124), and Break Even Return (5.699%).

The bottom screenshot is the 'InfoMack Retirement Planner' interface. It shows a 'Retirement Planning' dashboard with tabs for 'RETIREMENT PLANNING', 'INVESTMENT & SAVINGS', 'MORTGAGE & LOAN', 'KNOW YOUR CLIENT', and 'INSURANCE PLANNING'. The 'YOUR PLAN' section displays a table of income sources for the year 2035, including Client Age (60), Spouse Age (58), Target Income (\$112,591), CPP/QPP (\$0), OAS (\$0), Company Pension (\$11,527), Other Income (\$0), Registered Income (\$2,011), M/R Income (\$99,042), and Shortfall/Surplus (\$0). Below the table, there are several strategy adjustment checkboxes: ADJUST INCOME NEEDS, ADJUST RATE OF RETURN, FINANCIAL ADJUSTMENT, PENSION ADJUSTMENT, AGE MODIFICATION, CONVERT PROPERTY, SAVE MORE, and RRSP MODIFICATION. To the right of the table is a bar chart titled 'Income Sources' showing 'Income \$' on the y-axis (ranging from 0 to 200,000) and 'Year' on the x-axis (ranging from 28 to 47). The chart compares 'TARGET INCOME' (blue bars) and 'PROJECTED INCOME' (green bars) over time.

KEEPING YOU AHEAD OF THE INDUSTRY

Architecture

- Browser based, J2EE web application
- Central database server for shared information access
- Single sign on with authentication system
- HTML/PDF/RTF-Reports
- Web services integration

Features

- Suite incorporates both calculators and sales methodology to allow both the salesperson and client to understand the impact of financial decisions
- Allows clients to create a comprehensive financial plan or develop a plan in stages, using the components that are relevant to them at their particular life stage
- Helps client to explore cash flow, investing and borrowing while providing the financial institution with a seamless delivery approach
- Developed for deployment across all delivery channels (e.g., branch desktop, mobile sales force, public website, secure website)
- Tools are “white labeled” for clients to reflect the corporate marketing image

System Environment

Connection

- Internet/Intranet/Extranet

Application Server Operating System

- Windows and Unix

Database Supported

- MS SQL 2000 (SP 2)

COMPANY PROFILE

At CGI, we're in the business of satisfying clients by helping them win and grow. For more than 30 years, we've operated upon the principles of sharing in clients' challenges and delivering quality services to address them.

As a leading IT and business process services provider, CGI has a strong base of 31,000 professionals operating in more than 125 offices worldwide, giving us the competitive advantage of close proximity to our clients. Through these offices, we offer local partnerships and a balanced blend of global delivery options to ensure clients receive the optimal combination of value and expertise required for their success.

We define success by helping our clients achieve superior performance and gain competitive advantage.