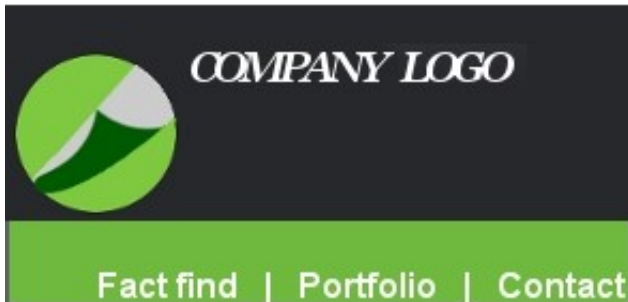


Profida Newsletter – September 2009

New Functionality

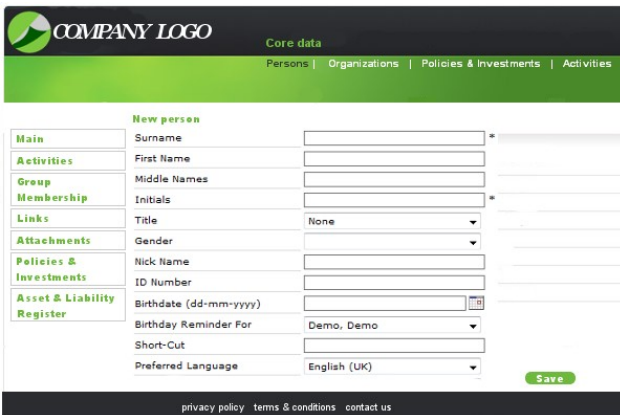
September sees the release of exciting new functionality that will allow you to provide your clients web logins for completing their fact finds and updating their personal details. We take this a step further and give you the option of white-labelling Profida with your company branding.



Your Company Branding

September sees the release of new functionality that allows you to brand Profida in your own company colours and branding.

You provide us with your logos and your colour palette and we will do the rest.



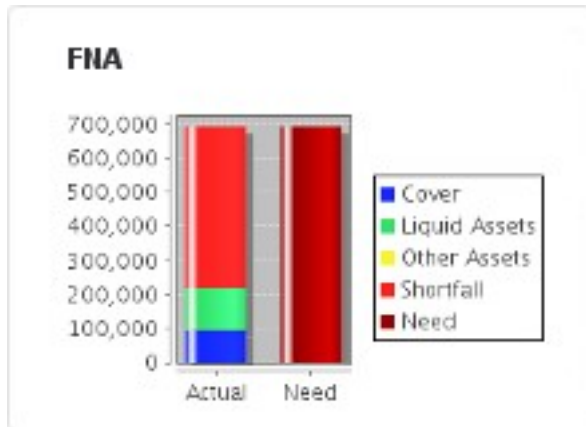
New person	
Main	Surname <input type="text"/>
Activities	First Name <input type="text"/>
Group	Middle Names <input type="text"/>
Membership	Initials <input type="text"/>
Links	Title <input type="text"/> None
Attachments	Gender <input type="text"/>
Policies & Investments	Nick Name <input type="text"/>
Asset & Liability Register	ID Number <input type="text"/>
	Birthdate (dd-mm-yyyy) <input type="text"/>
	Birthday Reminder For <input type="text"/> Demo, Demo
	Short-Cut <input type="text"/>
	Preferred Language <input type="text"/> English (UK)
<input type="button" value="Save"/>	

Client Fact Find Login

Is your first meeting with you client just about filling in a fact find? Well change that now by providing your clients with a client login to their fact find which they can complete before your initial meeting.

This gives you the opportunity to then spend time with them reviewing their goals and risk profiles, instead of just capturing personal details.

Looking Ahead



Financial Planning

Soon to be released is the financial planning section for Profida's Web Edition.

This allows for a full needs analysis to ascertain the client's situation in the event of:

- Retirement
- Death
- Disability
- Severe Illness

Look out for FNA in October's newsletter

Feedback



We welcome your feedback on Profida and want to remind you to let us know of any additional functionality you would like to see.

We assess our work stack continually so we are always flexible and can fit in new ideas very quickly.
