



Quick Plan allows you to easily generate advice documents and track your client's investments.

Quick Plan allows fast and efficient generation of advice documents, such as SoA, SoAA and RoA for limited placement or review advice.

Time saver wizard

Quick Plan is designed so you only enter the specific details required for the client you are developing the advice document for. You can configure what information is required and in what logical order it is presented. Using Quick Plan means you no longer need to enter unnecessary fact find details.

A range of quick plans

This module gives you out-of-the-box Quick Plans covering investment and superannuation for retail and platform advice as well as the ability for you to configure your own set of Quick Plans.

You can view and manage the Quick Plan status from on hold, accepted or not accepted. This can be viewed at an individual client level or for all clients for whom you have completed a Quick Plan. On acceptance, Quick Plan transitions all investment data to the Analyser module, showing an investment status of either unconfirmed or pending.

Simplified client creation

Once your client is created in Quick Plan all information is transferred to create a client record in the Dice module. This client can then be used for additional Quick Plans, marketing, portfolio reporting or expanded upon for detailed cashflow or insurance modelling any time in the future.

Along with the investment data, all Quick Plan SoA are automatically stored in the document list area. This ensures an appropriate document history is maintained for the client.

Main Quick Plan screen

Quick Plan Limited Advice Options

- Produces fast and efficient advice documents
- Out-of-the-box Quick Plans pre configured by COIN Office
- Ability for you to configure practice specific Quick Plans
- View the status of all Quick Plans at the client or group level
- Seamless transfer of client and investment data to Dice