COIN
POWERING PRACTICE EFFICIENCY

STRATEGY

Strategy is a comprehensive cashflow and strategic modelling tool where scenarios and recommendations can be populated into advice documents.

Strategy allows for transactional cashflow analysis where you can model precisely at the asset class, sector or product level.

Multiple scenario comparisons

Through Strategy you can create and compare multiple scenarios in either tabular or graphical formats, as well as view projections for a period of up to fifty years.

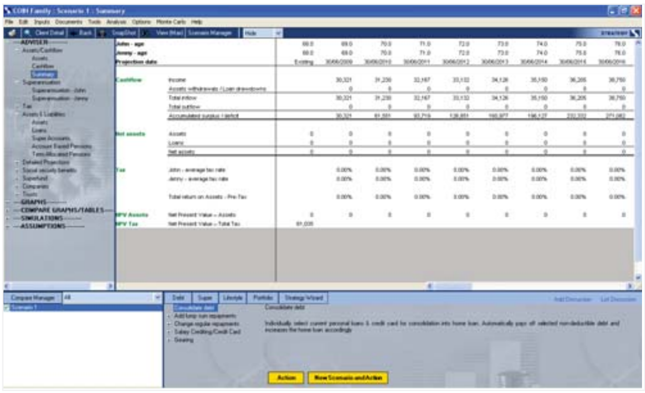
Efficient projections

There are no limitations on the number of assets, liabilities, income, expenses, superannuation funds, insurance, companies or trusts a client group can hold. It is possible to model at a basic or detailed product level allowing efficient projections.

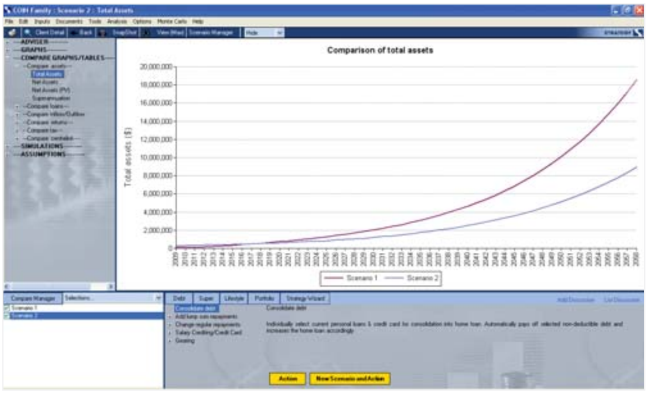
Strategy wizard

Strategy also has a 'strategy wizard' feature. This allows the interrogation and analysis of all fact find and cashflow information to identify appropriate strategies a client may be eligible and suitable for. This feature ensures no strategy is overlooked for a client and also serves as an excellent training tool for new staff.

Strategy has a number of specialised tools which can be used standalone with the resulting outcomes incorporated into a SoA or saved as a client note.



Main Strategy screen



Comparing Strategies

- Compare unlimited client strategies graphically and numerically with detailed variations between each strategy
- Cashflow projections can be viewed for up to fifty years
- All information displayed with the scenario can be incorporated into the SoA
- Seamless integration with Dice
- Unlimited asset, liability, entity and service details can be entered
- Projections demonstrate the full effect of tax, superannuation and social security legislation

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