

# One stop financial planning



eValue is the UK's leading provider of financial planning and forecasting solutions, with a track record for excellence and innovation having been established in the industry for over twenty years.

## Available through iO

Advisa Centa is a financial planning solution designed by eValue and available through iO. The solution includes four research tools as part of the standard Advisa Centa package. eValue's Advisa Centa lifetime, protection and pension freedom planner tools are also available upon request at an additional fee.



## Risk profiler

[MORE INFO](#) →

A psychometric questionnaire that allows you to assess your client's attitudes to investment risk.



## Investment planner

[MORE INFO](#) →

A tool that compares potential outcomes over time from the different investment strategies available; graphically illustrating the trade-offs between risk and reward, based on the proposed amount to be invested and specific financial goals of your client.



## Retirement planner

[MORE INFO](#) →

A retirement planning tool for demonstrating the benefits and potential pitfalls associated with different investment decisions to your clients.



## Portfolio analyser

[MORE INFO](#) →

A tool which enables you to analyse your client's current position and create solutions from investing new money, taking out new policies, through to switching fund allocations to better align your client to their risk profile and their financial goals\*.



## Lifetime planner

[MORE INFO](#) →

A tool designed to help advisers work with their clients to review their financial position throughout their life.



## Protection planner

[MORE INFO](#) →

A tool that helps advisers ensure that their clients have provided for their families in the event of their death or incapacity.



## Pension freedom planner

[MORE INFO](#) →

A tool designed to help advisers work with their clients to explore their retirement options in greater detail.

\* Please note that the optimiser functionality is available for an additional fee.