

# 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 20 years.

## Available through iO

Advisa Centa is a financial planning solution designed by EValue and available through Intelligent Office (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.

# EValue

Powering financial insight



## Risk profiler

[MORE INFO →](#)

A psychometric questionnaire that allows you to assess your clients' 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 clients.



## Retirement planner

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



## Portfolio analyser

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



## Lifetime planner

[MORE INFO →](#)

A tool designed to help advisers work with their clients to review their financial positions throughout their lives.



## 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.

For more information on EValue's Advisa Centa integration with iO call us on 0845 230 3800 or email us on [info@intelliflo.com](mailto:info@intelliflo.com)