

Market leading risk profiling & financial planning technology with Dynamic Planner[®]



Dynamic Planner combines powerful, market leading risk profiling, asset allocation and financial planning tools developed by Distribution Technology available through Intelligent Office (iO).

Benefits for you



Access to an award-winning tool for all your fund research needs



Enables you to share data between iO and Dynamic Planner, making rekeying data a thing of the past



Store reports generated in Dynamic Planner within iO



Ability to update client records with Dynamic Planner's Risk Profiling and Client facing apps, saving both you and your back office staff time



Helps you to achieve a more streamlined advice model and increase repeatable fee based revenues at lower costs

Dynamic Planner key features

- Best-in-class independent risk profiling tool
- Risk profiling questionnaires
- Links to over 850 risk profiled funds
- Online and offline risk profiling app
- Streamlined process to align agreed risk profile score to a fund solution
- Lifetime cash flow and budgeting
- Investment planning
- Living in retirement (available as an additional module subject to an additional charge)
- Client friendly reporting
- Robust evidencing MI & audit trail