EVPro Release Notes

24.1 (iO) / 7th February 2024

Introduction

We are pleased to confirm that a new release of EVPro will be available for use from the morning of 8th February.

This document will give information about any Improvements and system developments that have been raised via Support and will confirm any known issues.
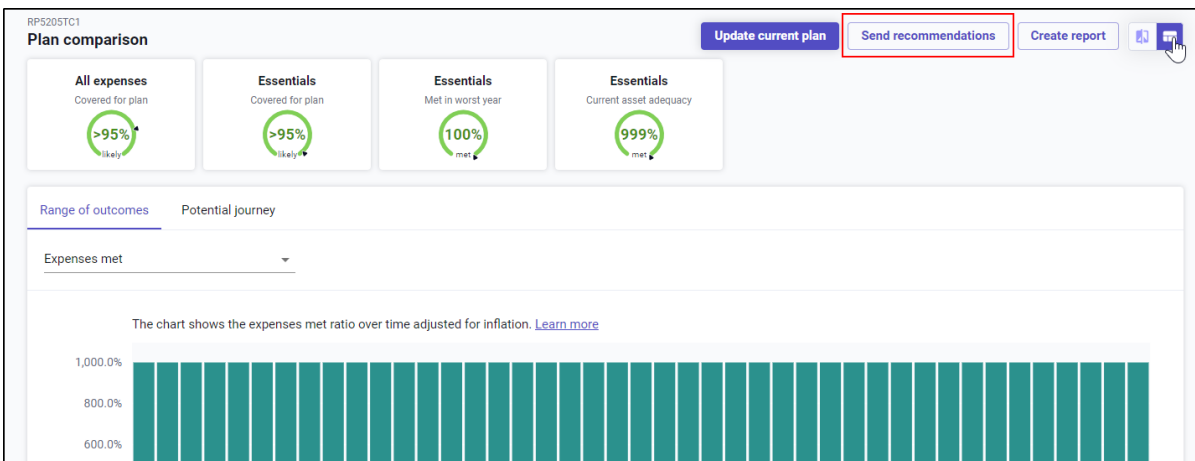
New Features

The following new feature has been added for this release.

Goal/Invest Module

For those users who use the integration between Intelliflo and EVPro, you will now be able to select a Revised plan from EVPro to send back to Intelliflo as a Recommendation.

For those with the Goal and Invest modules have a new button on a Revised plan to enable this:

For those firms who have just selected the Invest module, the 'Send recommendations' button is here:
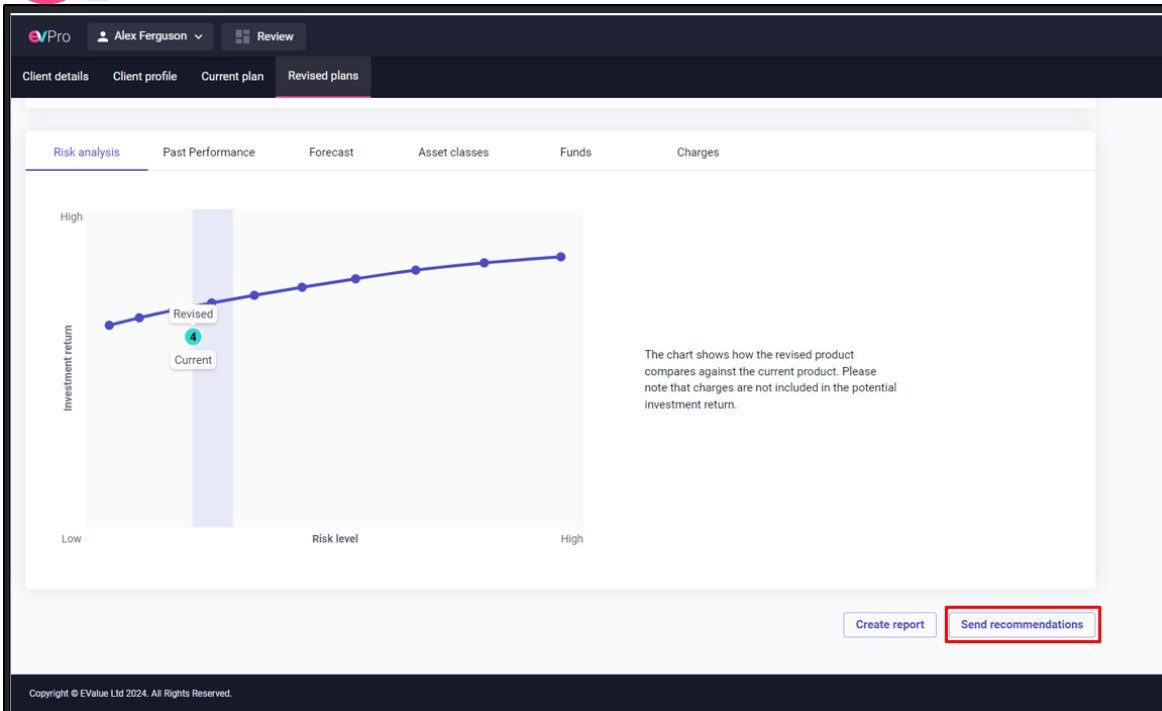
Please note: There are two instances when an error could appear when using this button to migrate a Revised plan to Intelliflo:

- Withdrawal Frequency – EVPro has a frequency of 'Termly' for Withdrawals which Intelliflo does not have.
- Your Revised plan includes a Model Portfolio which has been set up in the EVPro and/or Intelliflo.

Goal/Invest Module

Withdrawals

It is now possible to add percentage Withdrawals to all Assets where Withdrawals are enabled.

When adding Pensions, there will now be an option to record 'Regular withdrawals' from the normal minimum pension age.

A new 'Info' button has been added to 'Regular withdrawals' to confirm how withdrawals from different Product types are taxed, which is seen in the above screen shot.

Please note: if the Withdrawal being recorded is on a Pension, users will not be able to start the Withdrawal until Normal Minimum Retirement age.
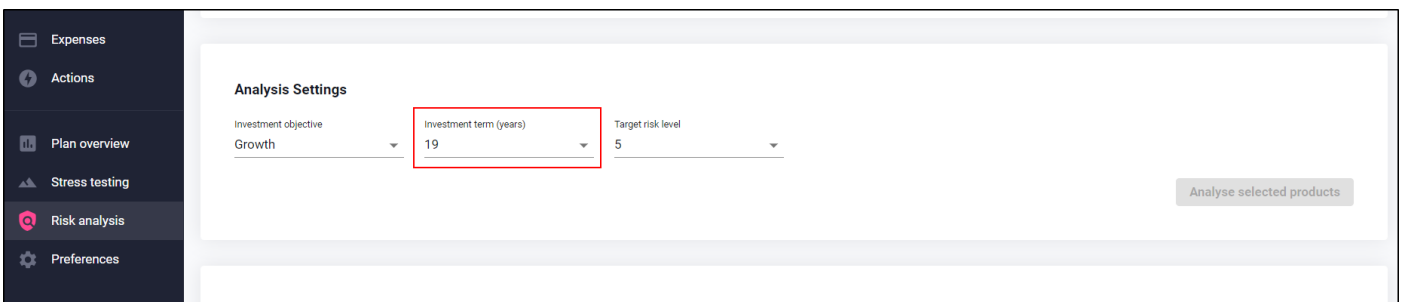
Settings

Default Investment term

Firms will be able to set their 'Default investment term' (which currently defaults to 10 years) within the Settings section for use in the Invest module.
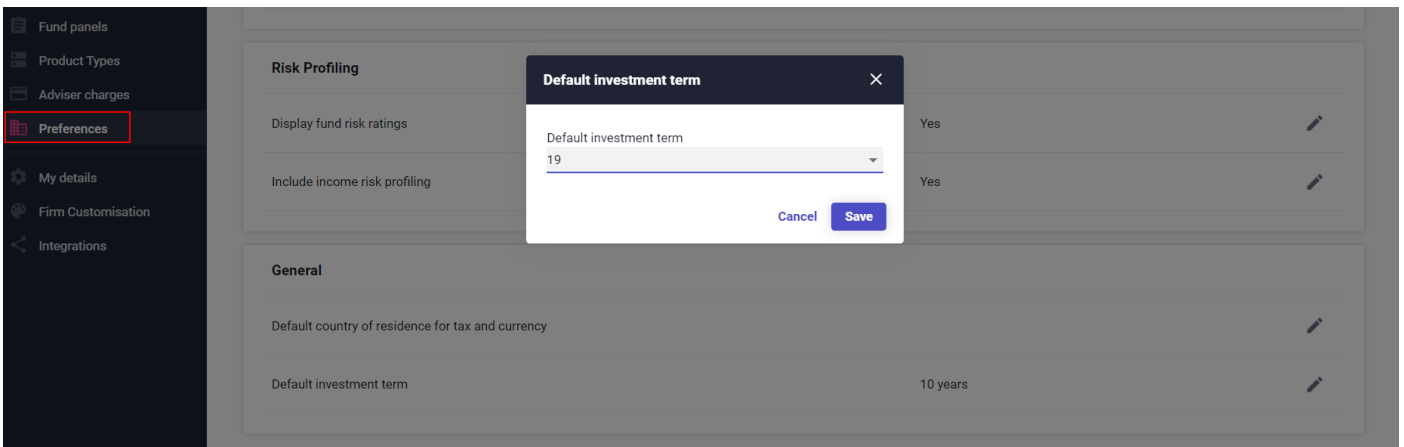
When in the Invest module:

Filtering on Model Portfolios

When in Settings > Model portfolios you will now be able to enter some filtering to make it easier to find the Model portfolio(s) that you are looking for. The first is to filter on the 'Risk level' and the second is to filter on the 'Status':

New option for Model Portfolios

When a Model Portfolio is being created, there is now the option to use a Portfolio analysis button to view either the 'Risk rating' or the 'Asset allocation' of it.

This button can also be used to view the 'Asset allocation' for previously published Model Portfolios.

Other Developments

The following system developments have been included in this release.
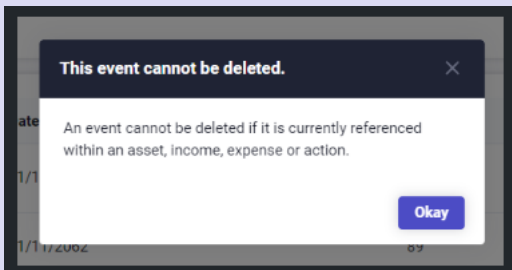
Detail
For those users who are using custom benchmarks, the correct Asset allocations will show when changing a clients risk score and investment term (SD-9958)
For Intelliflo users, we have corrected an issue with the migration of regular contributions showing as £0.00 on the summary page in Assets.
We have put right an issue that some users reported, when in 'Revise assets' and editing a one-off charge for an Asset when it has a contribution linked to an Event and the amount is reduced to £0.00 (SD-9956)
When withdrawals are taken to meet a clients Expenses in the Goal module, those withdrawals will now be taxed accordingly
When deleting custom events used in pension lump sum Actions, the 'Something went wrong' error has been replaced with a new message (SD-9647)
Users who had added percentage contributions where then seeing the figure showing as the annual investment in the Pensions table

Open API Users

For firms using our Open API, the Swagger spec will be updated by close of plan the day **following** the release to Production.

To access it:

- Log into the App store.
- Click on Open-api.

- Open the Documentation tab.
- Click 'Other'.
- Click 'Download' by the Swagger spec.

If you have any questions, please email our Support team on support@ev.uk or use the 'Contact support' link in EVPro.