

# **EVPro Release Notes**

# 24.1 (i0) / 7th February 2024



We are pleased to confirm that a new release of EVPro will be available for use from the morning of 8<sup>th</sup> 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:

<u>e/</u>	,				
€√Pro 💄 Alex	Ferguson 🗸 📲 Revi	ew			
Client details Client	t profile Current plan	Revised plans			
-					
Risk analysis	Past Performance	Forecast	Asset classes	Funds	Charges
Hiby	Revised Current		-	-•	The chart shows how the revised product compares against the current product. Please note that charges are not included in the potential investment return.
Low		Risk level		High	
Copyright © EValue Ltd 202	74 All Richts Reserved.				Create report Send recommendations

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.

Amount	Frequency				
£ 200.00	Monthly	•			
Start	Start date		Never	End date	
		-	Dete		-
Date -	16/01/2024		Date	16/01/2025	
			Retirement		
Regular investment			Mortality		



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.

Fund panels		
Product Types	Risk Profiling Default investment term ×	
Adviser charges		
Preferences	Display fund risk ratings Yes Default investment term	1
🗘 My details	Include income risk profiling Yes	1
Firm Customisation	Cancel Save	
< Integrations	General	
	Default country of residence for tax and currency	1
	Default investment term 10 years	1

#### When in the Invest module:

8 0	Expenses Actions	Analysis Settings	
	Plan overview Stress testing	Investment objective Investment term (years) Target risk level 19 • • • • • • • • • • • • • • • • • •	Analyse selected products
0	Risk analysis		
\$	Preferences		

#### 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':

nvestment term (years)	Risk level filter St	atus filter				
0		o status filter 👻				
Name	Growth risk $~\uparrow~$	Decimal risk	Charge	Published	Status 👔	
EVPRO-4742 Test 1	(2)	2.4	0.0%	21/07/2023	Published	* *

#### 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.

Fund	Allocation	Charge	Growth Risk	Portfolio analysis	llocation 👻
Baillie Gifford Pacific A Acc	30	1.61	(10+)		
L&G Mixed Managed G21 Acc	70	1.35	(5)	8	
	100.0%	1.428%		Global Bonds	32.69%
				Emerging Market Equity	28.89%
				UK Equity	10.64%
				US Equity	10.39%
				Conservative Alternatives	5.25%
				European Equity	4.11%
				Money Market	3.33%
				📕 Asia ex Japan Equity	3.04%
				Japanese Equity	0.90%
				Property	0.77%



## **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.

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

If you have any questions, please email our Support team on <a href="mailto:support@ev.uk">support@ev.uk</a> or use the 'Contact support' link in EVPro.

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