



EVPro Release Notes

Production Release 24.7





Introduction

We are pleased to confirm that a new release of EVPro is being released to Production for use on 26th July 2024.

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/improvements

The following new features or improvements have been added to EVPro for this release.

New Integration

We are pleased to announce an integration with the Plannr software. Users will be able to migrate any single or joint client and their Assets and attached funds into EVPro using the 'Import client' button:

Import a client [X]

Client first name
Lionel

Client last name
Messi

Client ID

Search

Each Plannr user who has an EVPro licence will need to link their Plannr account to their EVPro account.

Risk Module

To support the FCA income thematic review, we have now split out the Growth and Income ATR scores, both of which can be completed for a client.



Client details | **Client profile** | Current plan | Revised plans

Client profiling
Overview / Justin Create report Send questionnaire

Attitude to risk (growth)
3
Level set on 23/07/2024
Review and set level

Attitude to risk (income)
2
Level set on 23/07/2024
Review and set level

Knowledge and experience
Level set on 23/07/2024
Review and set level

Sustainable investing
Level set on 23/07/2024
Review and set level

Capacity for loss
Level set on 23/07/2024
Review and set level

The wording at the top of these two tiles is carried through the printable ATR questionnaire, into the client report, into Settings and through into the Invest module.

Client profile report

Client details: EVPRO 5483, 50 | Date of report: 24/06/2024 | **Investment objective: Income**

Risk level result

Risk level
3
The responses to the questions suggest an attitude to investment risk of 3

Asset allocation

- Global Equity 47.00%
- UK Index Linked Bonds 38.00%
- UK Government Bonds 15.00%

2. Moderate

Goal Module

Currently when a new client is added, the Mortality event added will be the one that the client has a 50% probability of reaching. This is being changed to the age the client has a 25% probability of reaching, therefore giving the client a better understanding of how their money may last. This will



be used in the Cashflow planning dials and graphs.

We are also adding a mortality table to the bottom of the Events page, giving three probabilities and the applicable ages.

The screenshot shows the Events page interface. At the top is a 'Timeline' section with a horizontal bar chart showing years from 56 to 100. Two events are marked: 'Retirement' at age 67 and 'Mortality' at age 94. A checkbox 'Show event names' is checked. Below the timeline is a table of events:

Name	Date	Age (New)	
Retirement	13/06/2036	67	
Mortality	13/06/2063	94	

Below the table is a 'Mortality guide' section with a table:

	50% chance	25% chance	10% chance
Life expectancy (New)	2057 (age 88)	2063 (age 94)	2067 (age 98)

Goal/Invest Module

Once a Revised plan has been created, there will be an option to clone it to either use a base for more changes or to be able to edit it. This can be found within the vertical ellipse button:

The screenshot shows a plan card titled 'Revised 1'. Below the title is the text 'Current plan snapshot 23/07/2024 12:10pm'. A vertical ellipsis button is visible, and a context menu is open over it, showing the following options: Edit, Rename, Clone, and Delete.

Once clicked the following will appear, for the new Revised plan's name to be added:

The screenshot shows a dialog box titled 'Clone revised plan'. It has a close button (X) in the top right corner. Below the title is the text 'Plan name' followed by a text input field containing 'Copy of Revised 1'. At the bottom of the dialog are two buttons: 'Cancel' and 'Clone'.

This will enable users of the Goal Module to build Revised plans based on the one before, or a couple



before.

For those users on just the Invest module, you will be able to edit a revised plan.

Other changes

The following are smaller changes which have been included in this release.

Details

We have added validation to prevent entry of a one-off expenses that occurs before the main life client's next birthday, which is the start date for all cashflow plans.

Add an expense [X]

Name
One off

Category
Holiday & Leisure

Frequency
One off

Essential amount Desirable amount
£ 10,000.00 £

Start Date Start date
13/12/2024

Date must be on or after client's next birthday

Cancel Add expense

Within Risk analysis, if a user chooses the 'Income' objective, the Target asset allocation for the clients risk profile has been added to the Current and Revised plans risk analysis sections.

A bug has been fixed so now the Revised plan Risk Analysis past performance chart will show the history based on the youngest fund (SD-10564)

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