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.

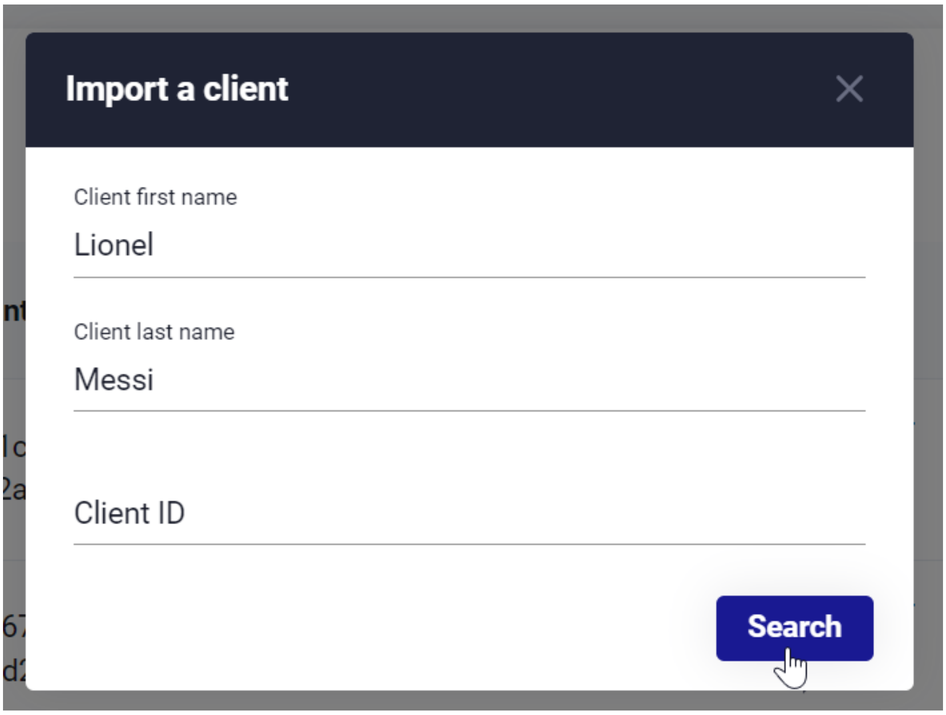
This document will give information about any Improvements and system developments that have been raised via Support and will confirm any known issues.

New features/improvements

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

New Integration

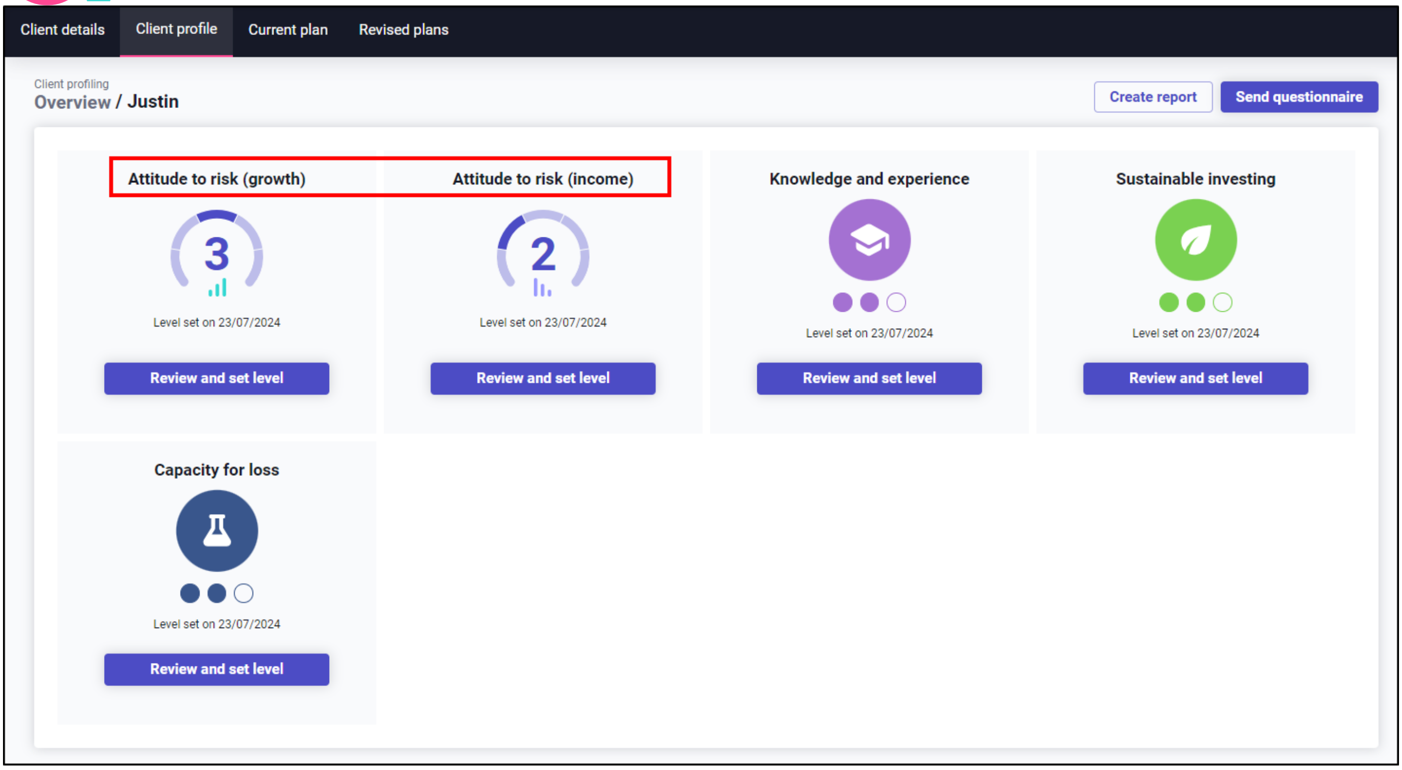
We are pleased to announce an integration with the Plannr software. Users will be able to migrate any single or joint client and their Assets and attached funds into EVPro using the 'Import client' button:



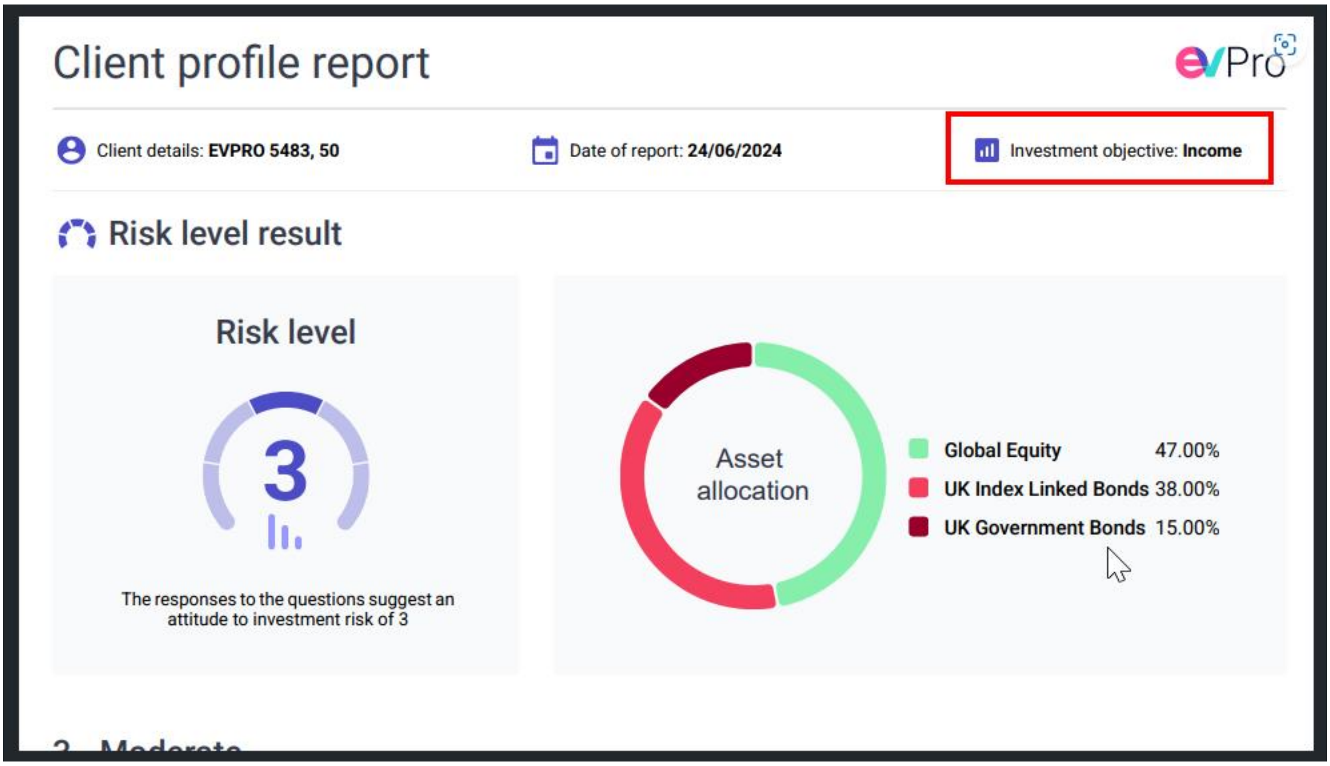
Each Plannr user who has an EVPro licence will need to link their Plannr account to their EVPro account.

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.



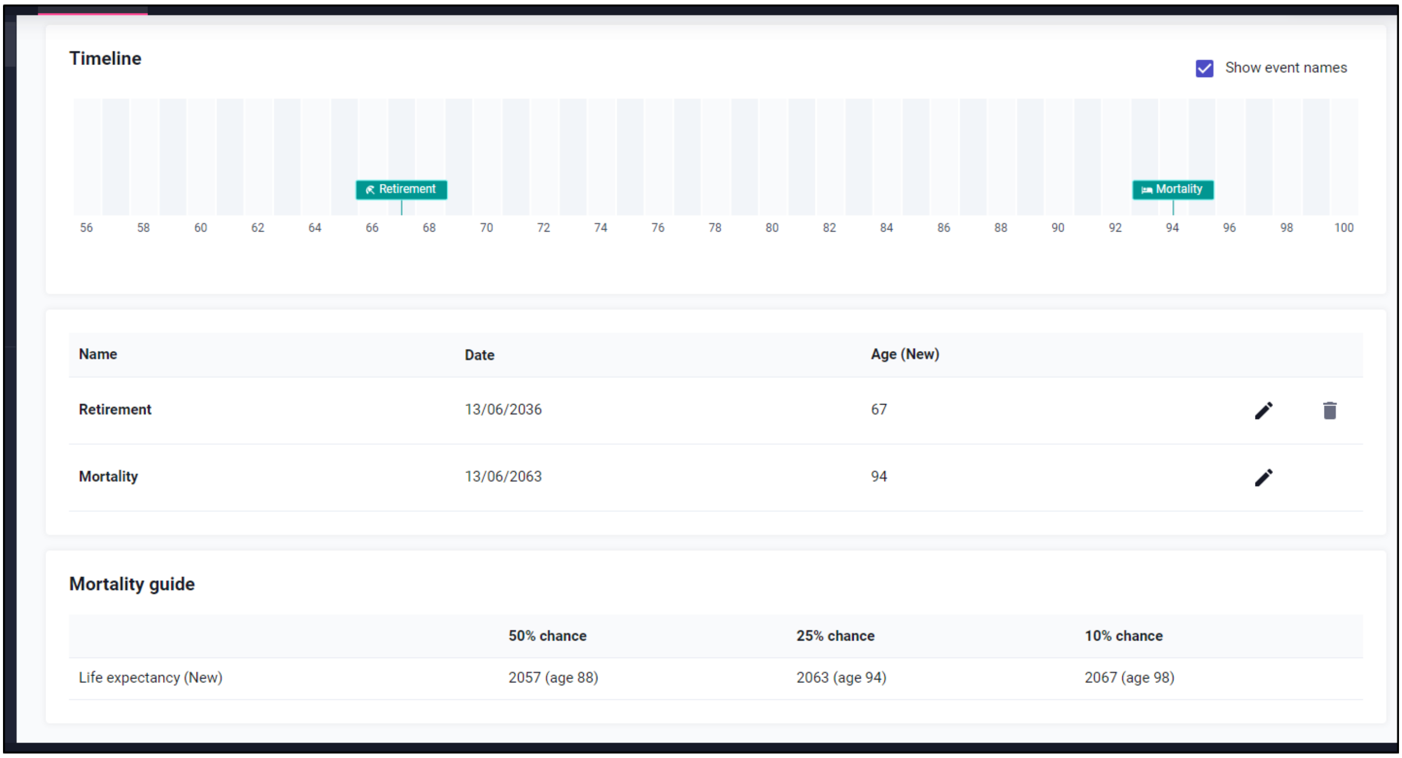
The wording at the top of these two tiles is carried through the printable ATR questionnaire, into the client report, into Settings and through into the Invest module.



Goal Module

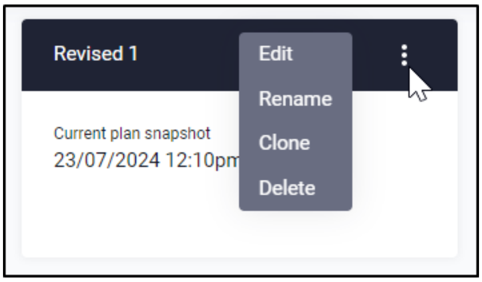
Currently when a new client is added, the Mortality event added will be the one that the client has a 50% probability of reaching. This is being changed to the age the client has a 25% probability of reaching, therefore giving the client a better understanding of how their money may last. This will be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

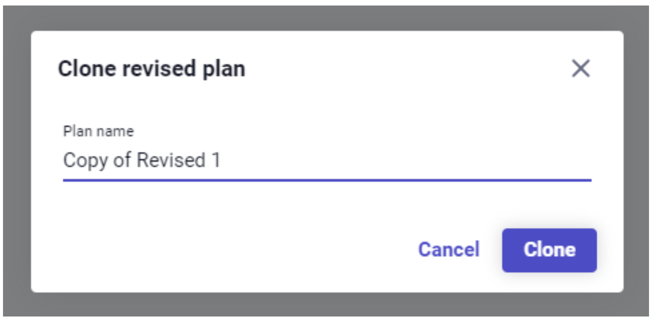


Goal/Invest Module

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:



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



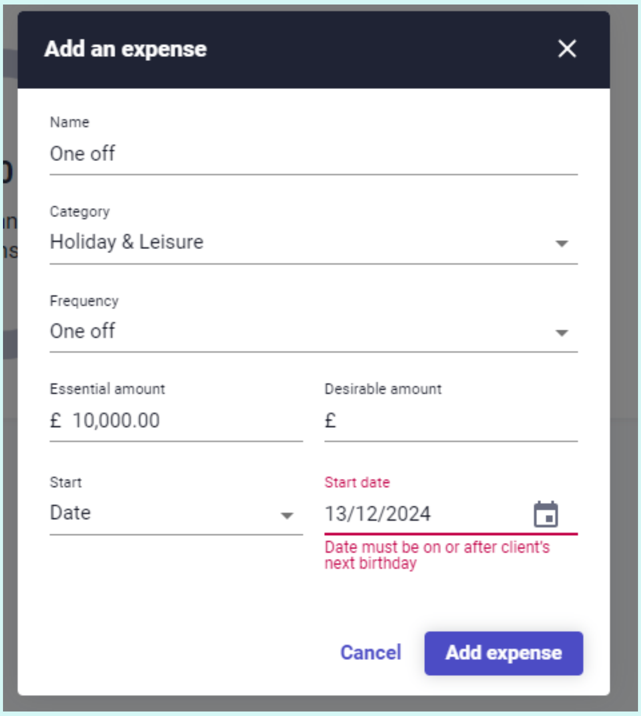
This will enable users of the Goal Module to build Revised plans based on the one before, or a couple before.

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.

<table>
<tr><th>Details</th></tr>
<tr><td>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.



</td></tr>
<tr><td>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.</td></tr>
<tr><td>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)</td></tr>
</table>

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