



FINCALC

Cashflow Modeller

Intuitive technology that provides you with end to end solutions



STRAIGHTFORWARD INPUTS & EASY TO UNDERSTAND GRAPHICAL OUTPUT

Simple data entry ensures a great user experience whilst handling complete financial planning from every day to high worth clients with more complex needs.

As well as easy to understand graphs and reports that are client friendly, yet powerful to integrate within your advice processes.



EXTENSIVE CALCULATION ENGINE INCLUDING INCOME TAX

Within our robust calculations we undertake **full Income Tax** calculations on a **month by month** basis.

Ensuring accuracy throughout the cashflow, which provides precise and transparent figures for your clients.



c/o O&M Pensions Solutions
3 The Courtyards, Phoenix Square
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03/20

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WHY USE OUR SOFTWARE?

EVENT CREATION

Build individual 'moments in time' for your client's individual circumstances that can be linked to any cashflow item created

EXTRA ADVISORIES

Intelligent calculations allow the system to point out potential issues which your Clients may encounter

SMART SCENARIO PLANNING

This tool enables you to **change only the elements important to your Client**. This helps illustrate exactly what changes in each scenario, as well as automatically updating with your clients changes over time. As well as this there are pre-designed scenarios for ease to see the impact of a **Stress Test, Pension Transfer and many more**.

CLIENT PORTAL

Our simple inputs allow clients to directly fill in their own details within the cashflow through a secure client portal to help save you time

YOU'RE IN CONTROL

Ability to set **multiple company level cashflow assumptions** and **user security controls** that will provide you with full control over the assumptions, as well as who can modify them

INTEGRATION WITH OUR DEFINED BENEFIT TOOL (TRANSVAS)

The option to incorporate the in-depth technical knowledge of defined benefit pensions, allowing users with both tools the ability to show the complete impact of a defined benefit transfer to further enhance your APTA



Why FinCalc?

Much more than essential
Financial Planning tools



OUR EXPERTISE

FinCalc is powered by O&M Pension Solutions who have been heavily involved in the financial services industry for over two decades.

Our Transvas tool was initially launched in 1993 and has become the industry standard TVA report engine for the discerning adviser.



CONTINUOUS DEVELOPMENT

Our team of experienced software and industry experts are responsible for the continued development of FinCalc.

From additional calculators to more advanced tools, we are tasked with helping to simplify your financial planning process.



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MORE THAN SIMPLY SOFTWARE

FIRST CLASS DATA SECURITY

Your client sensitive information is stored securely using UK based Microsoft Azure data centres and in compliance with GDPR data security requirements.

All data entered into our software is fully encrypted at rest and in transit

USER TRAINING

Extensive range of live Webinar training sessions available to all users, as well as helpful guides and videos, ensure you get the most out of our software

PERSONAL TECHNICAL SUPPORT

Our experienced Support Team staff are on hand to answer both your technical and user queries. They are contactable via telephone, email or website form

COMPREHENSIVE REPORTS

Sophisticated, transparent reports support your compliance and advice process needs

REPORT BRANDING

Give your reports that professional edge by adding your logo and company colour theme

INPUT DATA CHECKS

In depth checks on inputted data are made to ensure inconsistencies can be identified and managed. Information advisories are provided to assist you

MORE CONTROL

You manage the report production from start to finish giving you complete control especially when managing your client's expectations