



Plannr

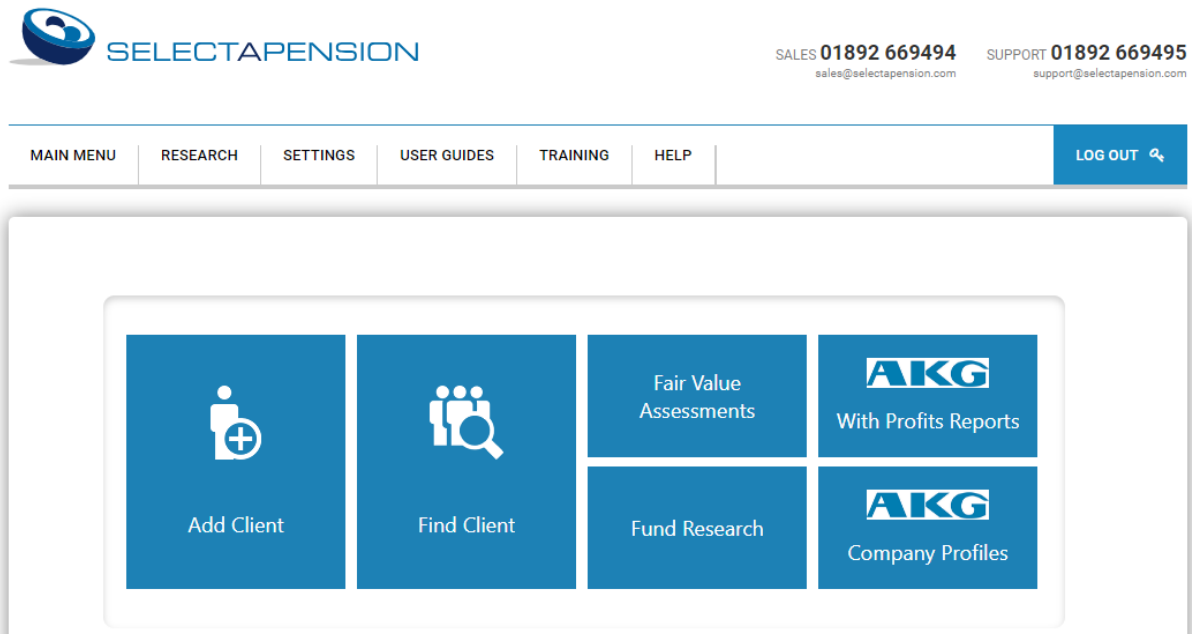
User Guide

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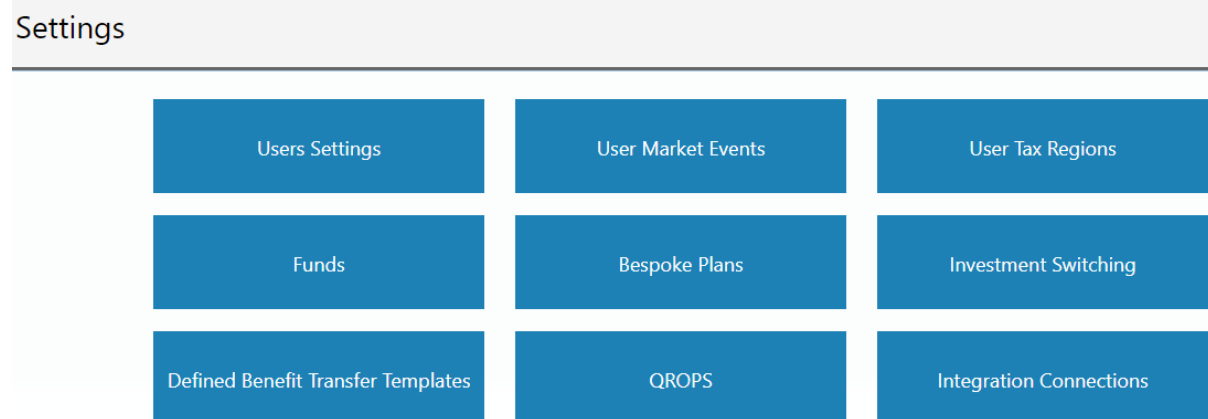
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Setting Up the Integration

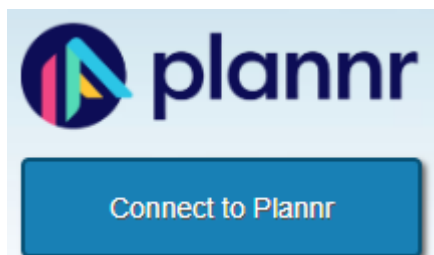
To link to Plannr, log in to Selectapension, then go to Settings at the top of the page.



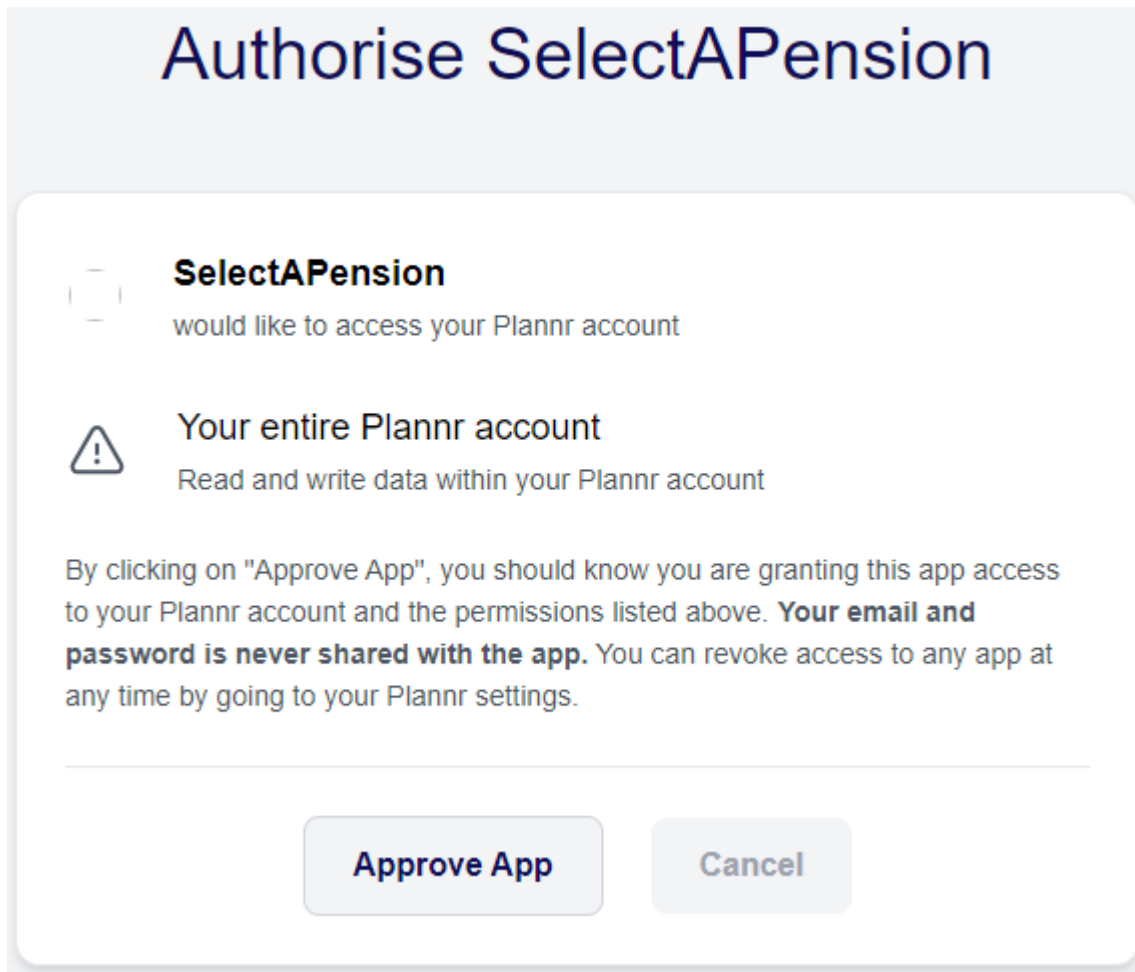
Choose Integration Connections in Personal Settings.



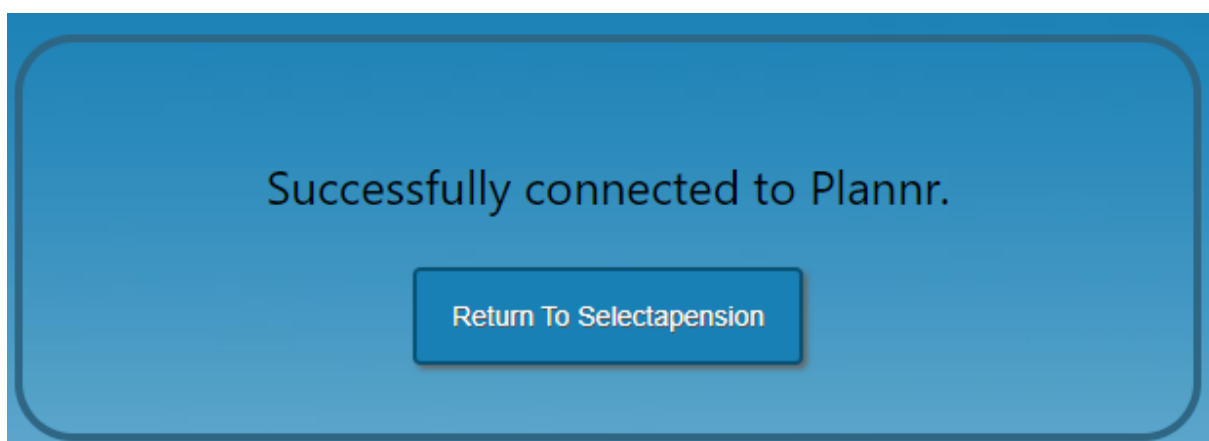
Select Connect to Plannr.



You will be prompted to login to Plannr and to allow Selectapension to access your account. Select Approve App.



Once you have connected to Plannr, a confirmation message will appear on your screen.



Using the Integration

Once the Integration is set up, new buttons will appear on the Client Details and Cashflow pages.

Client Details

Enter Details Of Your Client Below

Mandatory Fields

Reference	<input type="text"/>	Title	<div>Please Select...<div></div></div>
Forename	<div></div>	Middle Initials	<input type="text"/>
Surname	<div></div>	Gender	<div>Please Select...<div></div></div>
Date of Birth	<div><div></div></div>	Employment Status	<div>Please Select...<div></div></div>
Marital Status	<div>Please Select...<div></div></div>	Partner's Date of Birth	<div><div></div></div>
Partner's Forename	<input type="text"/>	Partner's Gender	<div>Please Select...<div></div></div>
Partner's Surname	<input type="text"/>	Any Dependants	<div>Please Select...<div></div></div>
Health Status	<div>Please Select...<div></div></div>	Attitude to Risk	<div>Please Select...<div></div></div>
Lifetime Allowance Protection	<div>Please Select...<div></div></div>	Lifetime Allowance Used	<div><div></div><div>%</div></div>
Country of Residence (for income tax)	<div>Please Select...<div></div></div>		
Notes	<div></div>		

Link client from Plannr

Create client

Click “Link client from Plannr” to choose the client from the list, then proceed to Create New Analysis.

Linking on Cashflow

Once on Cashflow, you will have a series of new buttons appear. These will import Expenditures, Incomes and Assets.

Expenditure

Plannr - Import Expenditures

Enter your client's known current and future **expenditure**. This will show alongside your target income in the report.

What is your client's expected expenditure

Name	Amount	Frequency	Start Age	End Age	+
Mortgage on Main Residence	£750	Monthly	1	Life	Edit ✕
Hire Purchase	£200	Monthly	1	Life	Edit ✕
Electricity	£80	Monthly	1	Life	Edit ✕
Gas	£20	Monthly	1	Life	Edit ✕
Water Rates	£30	Monthly	1	Life	Edit ✕

Guaranteed Income

Plannr - Import Incomes

Enter you client's known current and future **Guaranteed Income**. You can specify benefits to be paid for life or just to a specific age.

What is your client's expected current and future income?

Include in Analysis	Name	Amount	Start Age	End Age	+
<input checked="" type="checkbox"/>	Annuity - Main Client	240.00	null	Life	Edit ✕
<input checked="" type="checkbox"/>	Defined Benefit - Main Client	190.00	null	Life	Edit ✕

Assets

Plannr - Import Assets

Assets entered will be used to provide your clients target income where required. The asset can be selected to remain with the current provider or be included in the transfer comparison.

Current value of other assets to be used in retirement?

Include in Analysis	Name	Fund Value	Valuation Date	Growth Rates	+
<input checked="" type="checkbox"/>	Aviva Personal Pension - Main Client	£427000	21/02/2024 //		Edit ✕
<input checked="" type="checkbox"/>	Royal London Asset Management Ltd Isa Stocks And Shares - Main Client	£53000	21/02/2024 //		Edit ✕

These will bring through the details from Plannr.

Alternatively, there is the option to import assets individually, by clicking the + icon, then clicking the “Link plan from Plannr” option.

Assets

Assets entered will be used to provide your target income where necessary

Asset Belongs To

Main Member

Plan Type

Pension

Name of Asset

Aviva Personal Pension

Fund Value

£ 427000

Valuation Date

21/02/2024

Any regular contributions?

☐ Yes

☒ No

PCLS Already Taken

☐

Growth Rates

Low

Mid

High

Estimated Annual Charge

%

Fund Retained i

☐ %

☒ £

Include in transfer comparison? i

☐ Yes

☒ No

Cancel

Link plan from "Plannr"

Save

Save & Add New...