



Paraplanning Online Suitability Report Writing Solution

Company Background

Paraplanning Online Ltd was formed in February 2008 by the directors of Alexander Rowland Associates; a firm of AFPC qualified freelance paraplanners that has been trading since 2003.

Based in Shrewsbury, the PPOL team incorporates a broad spectrum of financial services and IT-related knowledge and experience. The very nature of our business means we are ideally placed to proactively identify industry trends and react to regulatory directives, ensuring that our suitability report writing solution remains compliant and at least one step ahead of the industry standard.

Suitability Reports - The Challenge

It is a regulatory requirement that financial advisers provide their clients with a suitability report that clearly justifies the advice given and the fees charged - Whether it is a simple pension recommendation or a complex pension switching and wrap recommendation.

Traditionally suitability reports have proved time consuming to write and companies often do not have the resources to ensure they are up-to-date and compliant. Moreover RDR is putting companies under ever increasing pressure to streamline their compliance procedures and ensure that the suitability reports they supply to their clients are consistent, personalised and up-to-date.



Paraplanning Online - The Solution

Paraplanning Online provide the most advanced, yet easy to use web-based suitability report writing solution on the market today. Unlike most other suitability report writing tools which are based on glorified templates and require the user to trawl through and select standard paragraphs; PPOL uses highly intuitive 'wizard' technology that guides the user through a logical step-by-step process that creates a compliant and professionally formatted suitability report based on the user's personal input.

Moreover, the "Add Additional Option" functionality allows reports to be further personalised to reflect an individual client's circumstances and objectives, and PPOL's unique Report Template Editor and My Info functionality provides the user with unrivalled flexibility to tailor their reports to reflect their company / house style and individual advice preferences.

Subscribers can also save details of their favourite funds and create and store details of model portfolios within their fund and portfolio libraries for easy inclusion within reports, thereby saving time and the need to re-key data. The fund and portfolio libraries can be managed on an individual or company level.

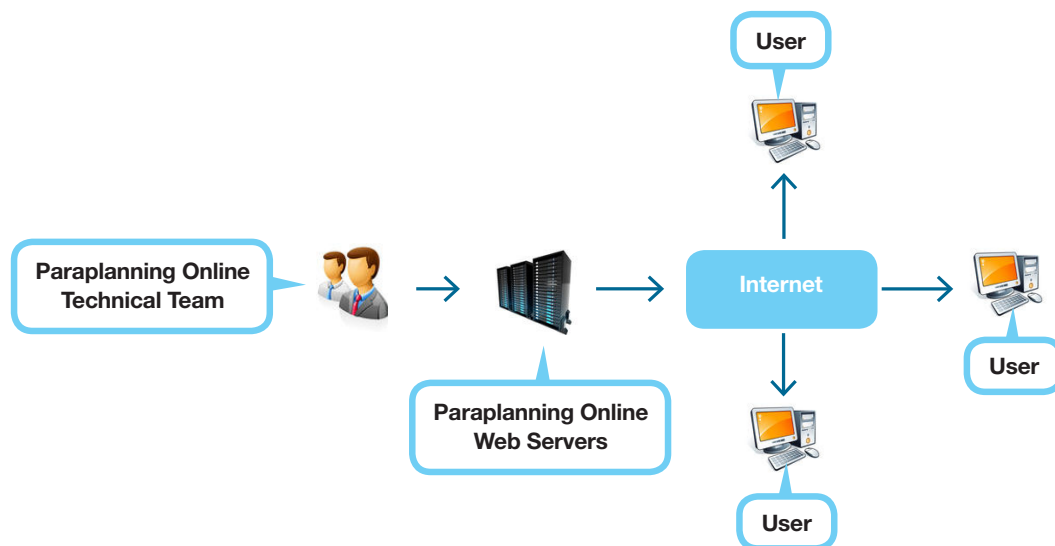
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Satisfying Compliance

Our technical team prides itself on ensuring that the PPOL suitability report writing solution is kept up-to-date in a timely fashion to reflect changes in taxation, legislation and compliance directives. A library of all of the updates and upgrades that have been applied to the PPOL solution since its release can be found under the Support section of our website.

Customer services and Support

The PPOL website contains a wealth of online support material including training videos, example reports and regular hints and tips to name but a few. Our customer services team are all experienced industry professionals who are dedicated to offering first class technical support and proactive account management. Moreover as a company we place significant emphasis on the need to maintain a two-way dialogue with our clients to ensure we keep abreast of their changing needs and the regular enhancements applied to the PPOL solution are often the direct result of this process.



Why Paraplanning Online?

Paraplanning Online's best of breed suitability report writing solution has many benefits including:

- > Easy-to-use intuitive wizard-driven report builder saves time and ensures accuracy
- > Kept right up-to-date with regards to compliance, tax law and government legislation
- > Regular prompts to include additional answers/reasons ensures personalisation
- > Customisable to reflect individual/company preferences and style of advising
- > Favourite funds and portfolio library saves the need to re-key data
- > Ability to include multiple recommendations within the same report
- > Scalable to meet the needs of individual IFAs and multi-adviser practices
- > 24/7 web enabled access from any location
- > No need to install software locally