

Paraplanning Online Price List

Subscription Type	Monthly Subscription	Services / Features Included
Single Standard User	£60	<ul style="list-style-type: none"> • “Add additional option” wizard functionality • Access to the Report Template Editor • Store up to 150 funds within My Funds library • Store up to 50 model portfolios within My Portfolios library • Store up to 10 reports online • Automatic compliance updates • Technical support
Single Mortgage Standard User	£20	<ul style="list-style-type: none"> • Limited to mortgage and protection reports • “Add additional option” wizard functionality • Access to the Report Template Editor • Store up to 10 reports online • Automatic compliance updates • Technical support
Company Account Super User	£100	<ul style="list-style-type: none"> • Centrally create and distribute company specific wording to standard users • Centralised “Add additional option” wizard functionality • Centralised access to the Report Template Editor • Store up to 150 funds within centrally managed My Funds library • Store up to 100 model portfolios within centrally managed My Portfolios library • Store up to 10 reports online • Automatic compliance updates • Training and advanced technical support
Company Account Standard User	£25.00 Bulk discounts apply	<ul style="list-style-type: none"> • “Add additional option” wizard functionality • Access Super User’s fund library and store up to 50 further funds within My Funds library • Access Super User’s portfolio library • Store up to 10 reports online • Automatic compliance updates • Training and advanced technical support
Mortgage Company Account Super User	£50	<ul style="list-style-type: none"> • Limited to mortgage and protection sections • Centrally create and distribute company specific wording to standard users • Centralised “Add additional option” wizard functionality • Centralised access to the Report Template Editor • Store up to 10 reports online • Automatic compliance updates • Training and advanced technical support
Mortgage Company Account Standard User	£12.50	<ul style="list-style-type: none"> • Limited to mortgage and protection reports • “Add additional option” wizard functionality • Store up to 10 reports online • Automatic compliance updates • Training and advanced technical support

All prices exclude VAT – Discounts may apply to members of certain networks and service providers

The PPOL solution has been designed to enable a user to tailor the content of the report to suit their individual style of advice and preferences. Only registered subscribers are authorised to use PPOL and we can only provide support to a registered user. Usage is constantly monitored and PPOL reserve the right to revoke access if they suspect the abuse of a license by an unregistered user.

Under a Company Account, Standard Users do not have access to the Report Template Editor as the underlying content of the report is managed centrally by the Super User. However each standard user will still be able to tailor some of the content of the report to suit their individual advice preferences using the My Funds and “Add additional option” facility.