



FE CashCalc

FOR FINANCIAL ADVISERS ONLY

# FE CASHCALC

Where financial planning happens

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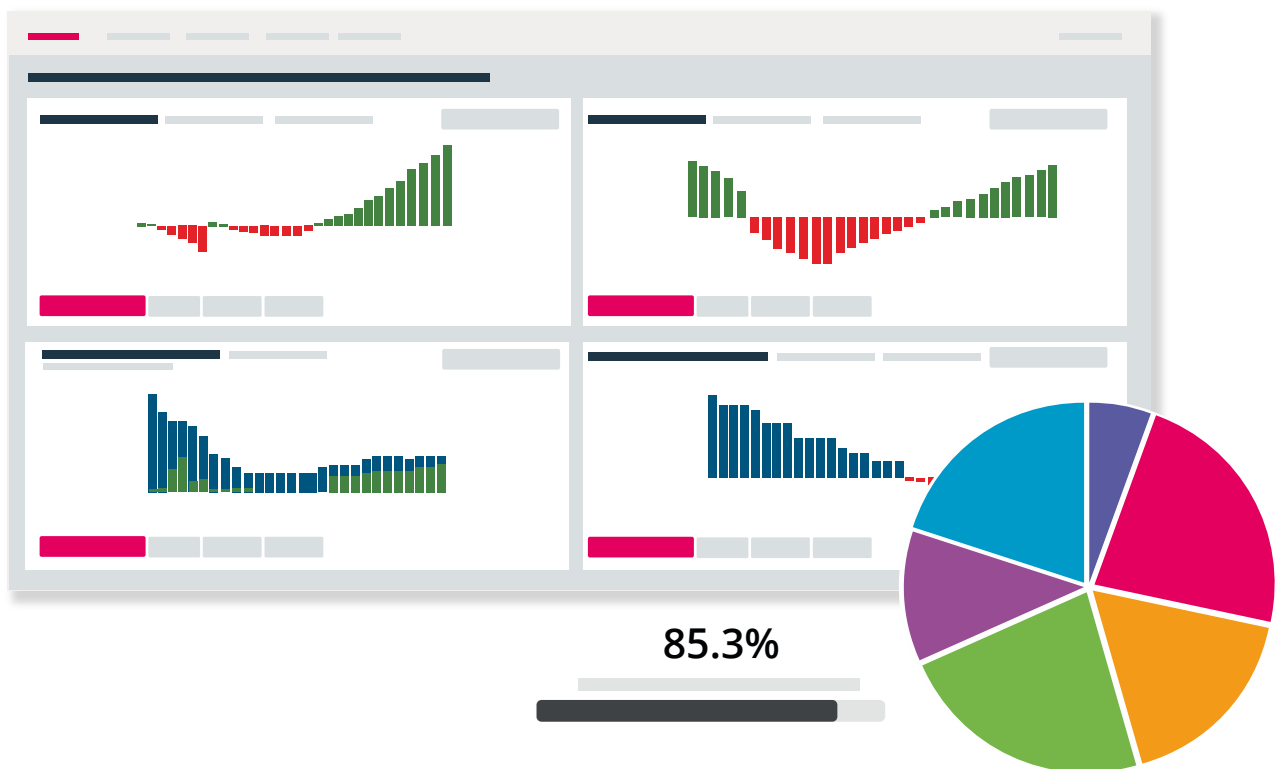
[fefundinfo.com/fe-cashcalc](https://fefundinfo.com/fe-cashcalc)

# SUPPORTING YOU THROUGHOUT YOUR ADVICE PROCESS

Our mission is to provide an integrated suite of online financial planning tools specifically designed to help you and your entire financial planning process. From enhancing client engagement to improving efficiencies, we are here to provide the tools you need to do your job and achieve your goals.









 [enquiries@fefundinfo.com](mailto:enquiries@fefundinfo.com)

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# ONBOARDING TOOLS

Our secure Portal enables both you and your clients to securely communicate and share information with each other remotely. From sending a digital fact find to digitally exchanging documents, we have everything you need to digitally onboard and engage with your clients.

-  Bespoke-Branded Secure Portal
-  Digital Fact Find
-  Secure Messaging
-  Disclosure Documents
-  Digital Accept
-  Open Banking/Finance
-  Attitude to Risk
-  Letter of Authority Generator
-  Full Integration with Cashflow & Back-Offices
-  2-Factor Authentication
-  Client Self-Onboarding
-  Custom Fact Find
-  Bulk Communication  
(eg. messages, documents, etc)
-  Document Exchange (2-way)
-  Share Custom Links
-  Anti-Money Laundering
-  Sustainable Investing Questionnaire
-  Client Review Date Reminder
-  Bank-Grade Security (AES-256)
-  App for iOS and Android

# INTEGRATIONS

By integrating your FE CashCalc account with all the other software providers you use, you can start to reduce the need to manually key any client information throughout your entire financial planning process.

## AVAILABLE NOW:



intelliflo Office



Iress Xplan



Origo Services



Zapier



Enable



Plum Software



Transact



FNZ



Credas



EV



Fundment



Client-Assyst



Praemium



Hubwise



Adviser Cloud



FE Analytics

# PLANNING TOOLS

With the country's market-leading Cashflow Modeller, you'll be able to create powerful and engaging lifetime cashflow plans which will bring your clients' financial situations to life. You can also enjoy 20+ other financial planning tools.



Cashflow Modeller (Net)



Capacity For Loss



Stress Testing



Timeline of Goals



Mortgage Tools



Pension Tools



Engaging Reports



Cashflow Modeller (Gross)



Investment Proposition



Monte Carlo



IHT Tool



Protection Tools









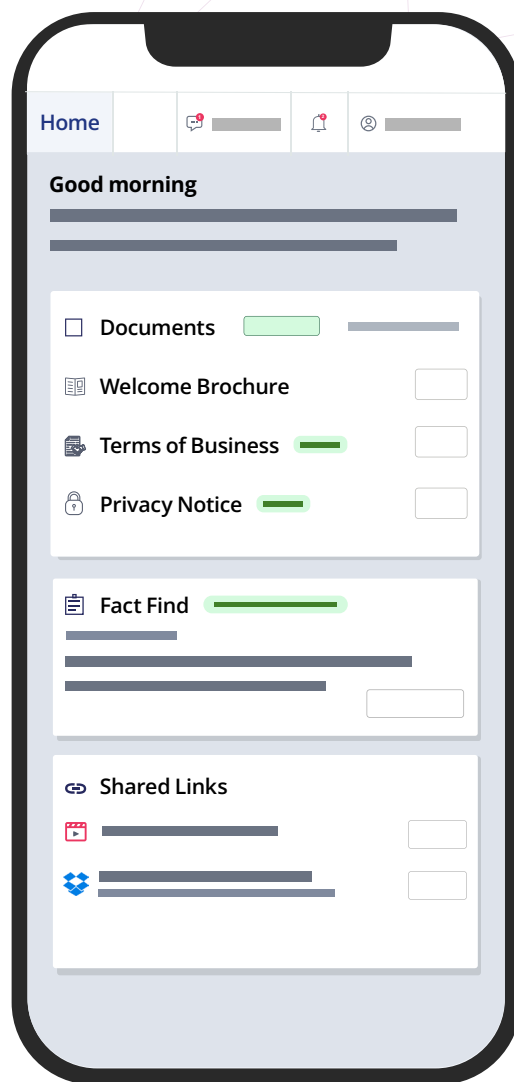
Investment Tools

# SECURE PORTAL APP

Our secure Portal app is designed to help both you and your clients securely communicate and share information with each other direct from your smartphones and tablet devices – transforming how you engage with each other.

## KEY FEATURES INCLUDE:

-  Free to download
-  Bank-level encryption (AES-256)
-  Available on iOS and Android
-  Advisers can access all their features
-  Clients can access their secure Portal
-  Instant notifications



# GET STARTED WITH A FREE 28-DAY TRIAL

Creating an account is quick and easy, and as soon as you register, you'll be granted full and unrestricted access to the entire suite of tools free for 28 days. Then, if you like FE CashCalc and all its features, you simply need to upgrade to a Premium Account.

 [CashCalc.co.uk/register](https://CashCalc.co.uk/register)

# FULL ACCESS FOR ONLY £60 / MONTH

You can upgrade to a Premium Account at any stage by clicking 'Upgrade' and setting up a monthly direct debit. You'll then be granted full and unrestricted access to the entire suite of tools, as well as the opportunity to add additional licences.

 [CashCalc.co.uk/upgrade](https://CashCalc.co.uk/upgrade)

## ADVISER LICENCE

**£60/ MONTH + VAT**  
Per individual adviser licence

## GROUP LICENCE

**CONTACT US**

## PARAPLANNER LICENCE

**FREE**  
With every individual adviser licence

# CONTACT US

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If you'd like to find out more about FE CashCalc or need help with a particular tool, our team are available Monday to Friday 9am-5pm and can help answer any questions you may have.

 [enquiries@fefundinfo.com](mailto:enquiries@fefundinfo.com)

 [fefundinfo.com/contact-us](https://fefundinfo.com/contact-us)