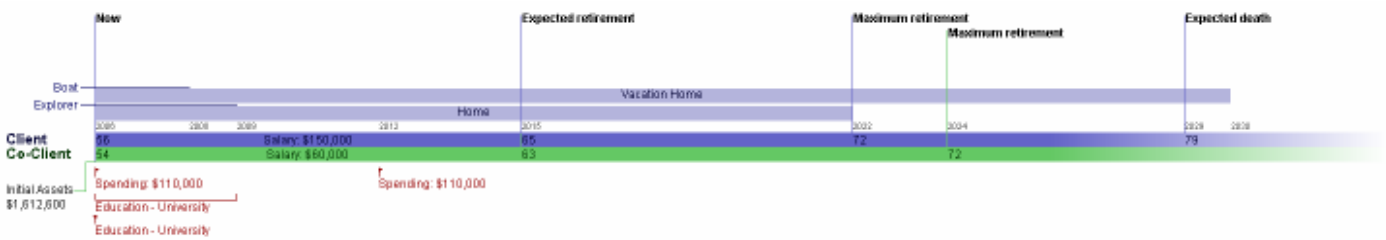
iALM *Individual* Asset Liability Management

Introducing the Interactive Client Report

A Typical Household

- Couple in their 50s
- $1.4m net assets, $201k income
- Goals: retirement expenditure and children's education



Getting an Overview

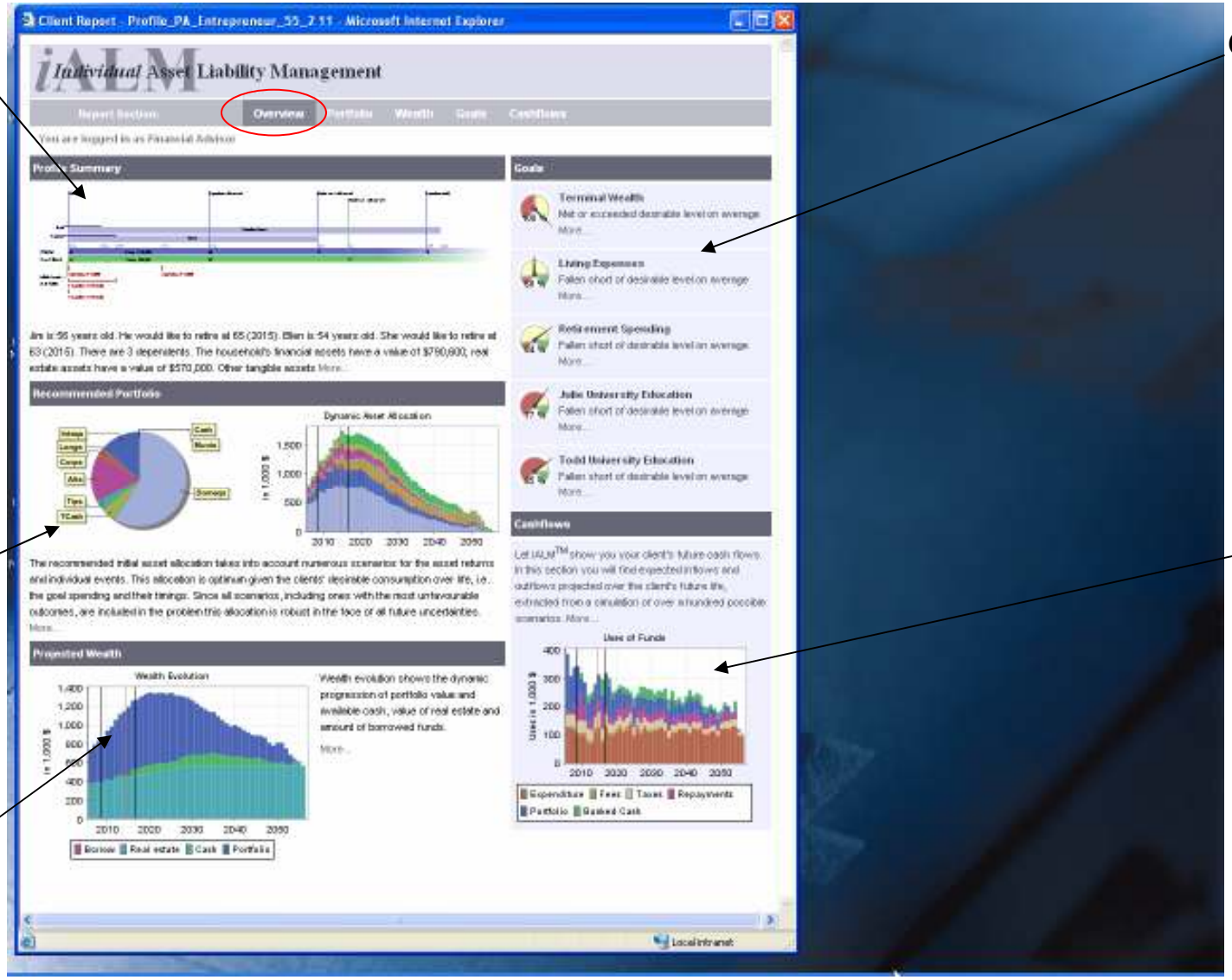
Visual Summary of Profile

Goals

Cash Flows

Portfolio

Wealth

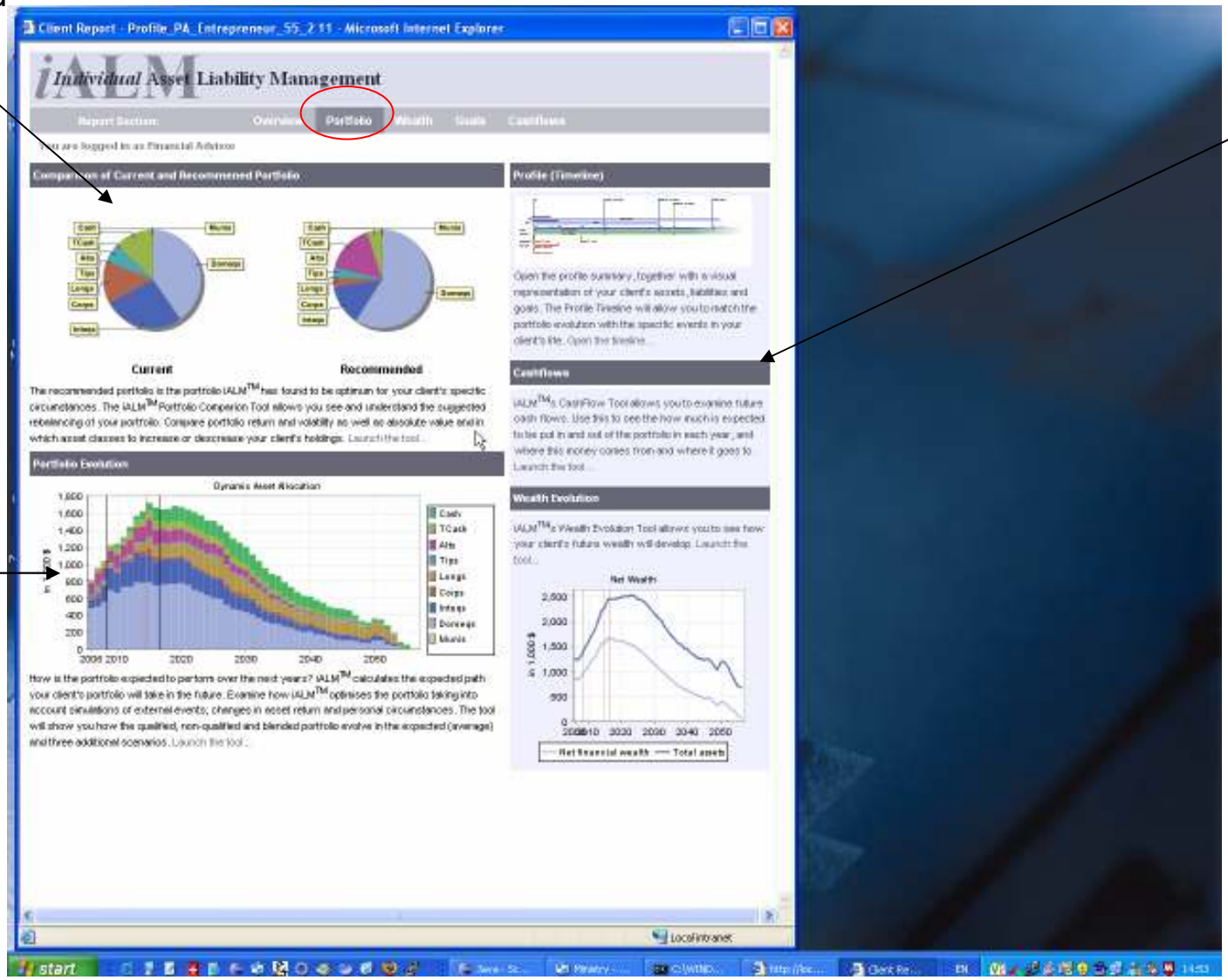


The Portfolio Section

Recommended

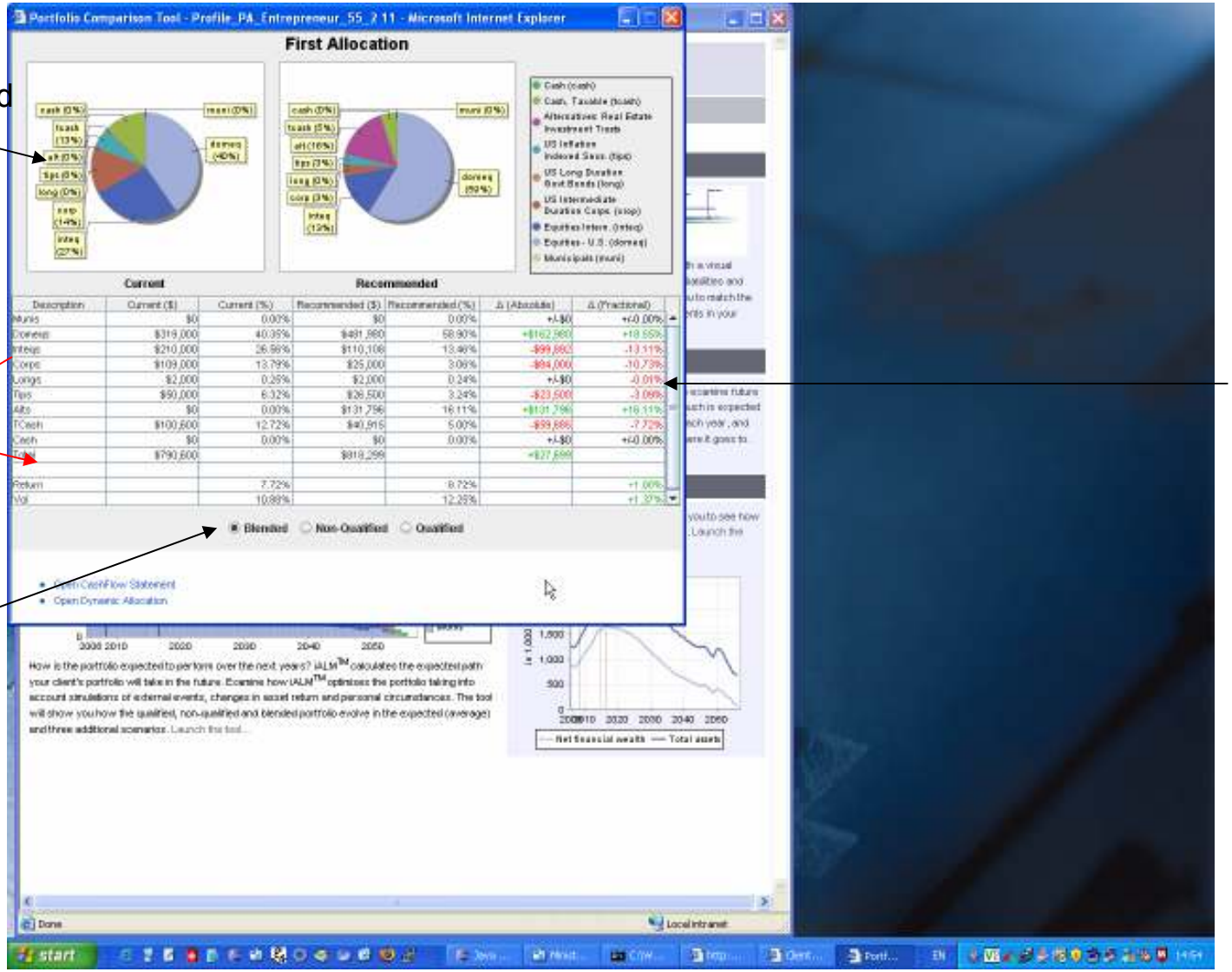
Contextual Information Always Available

Portfolio Evolution



Launching the Portfolio Tool

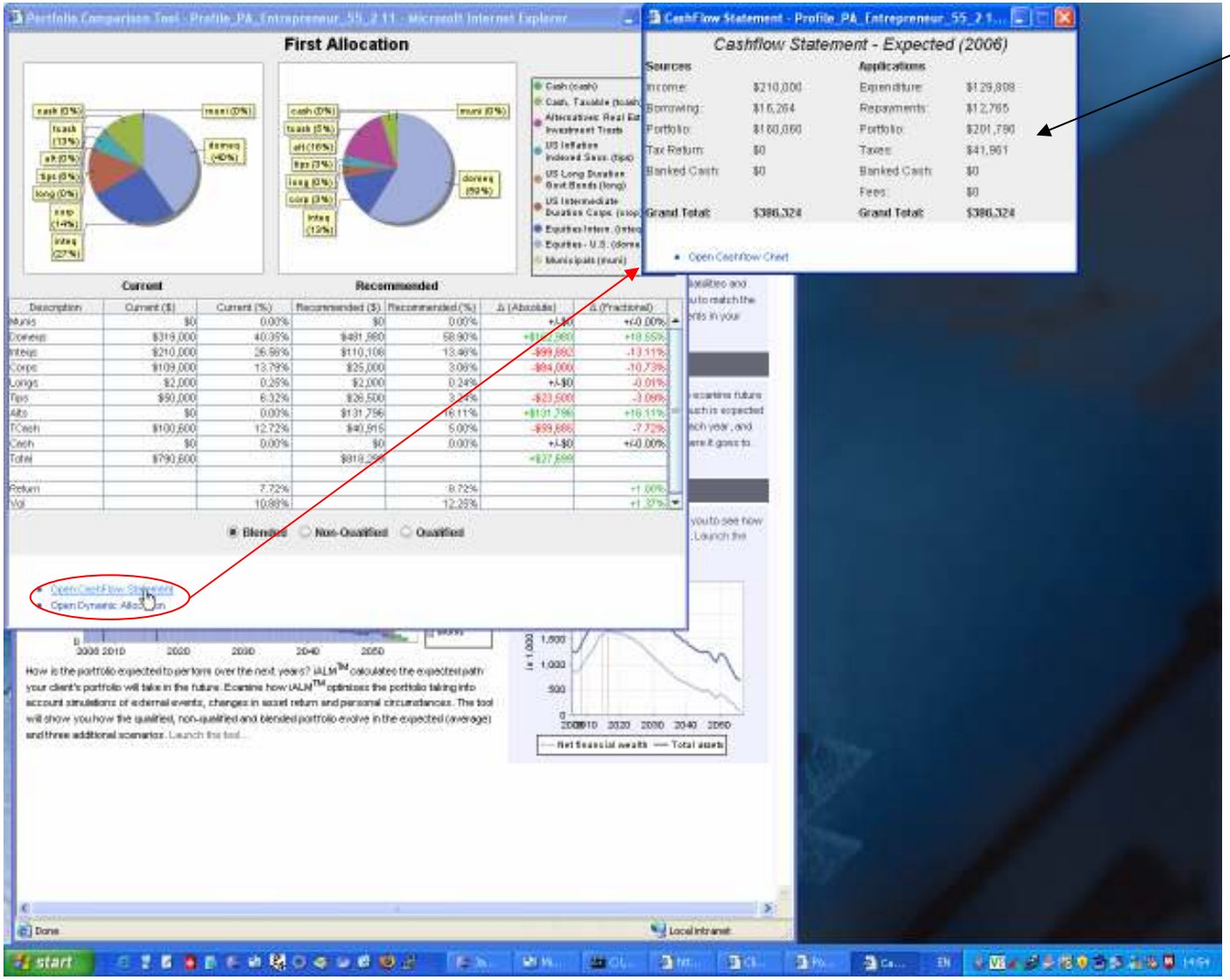
Side by Side Comparison - Current and Recommended



Colour-coded Comparison

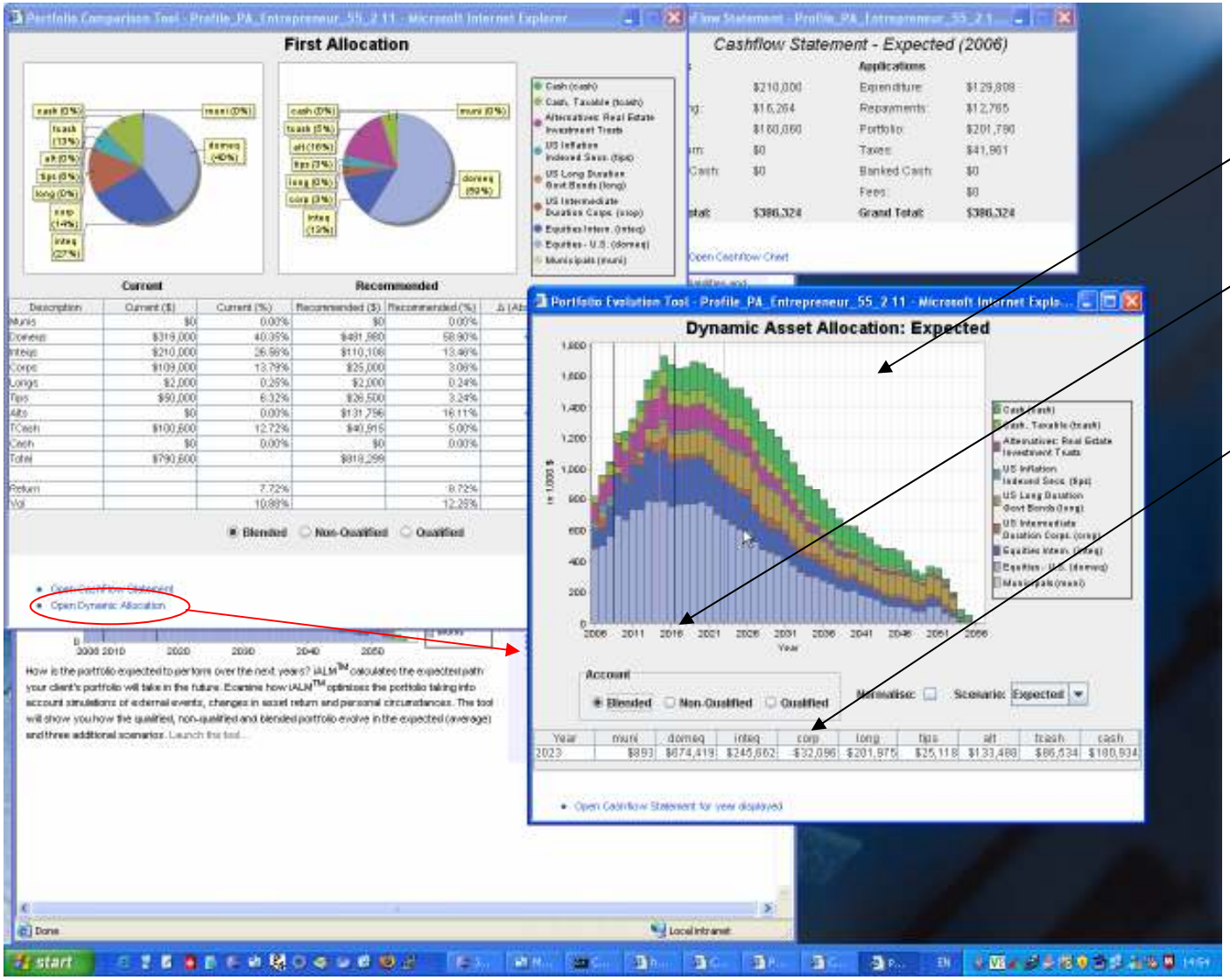
Portfolio Selection

Cash Flow into Portfolio



Cash Flow Statement for Current Year

Dynamic Portfolio Allocation



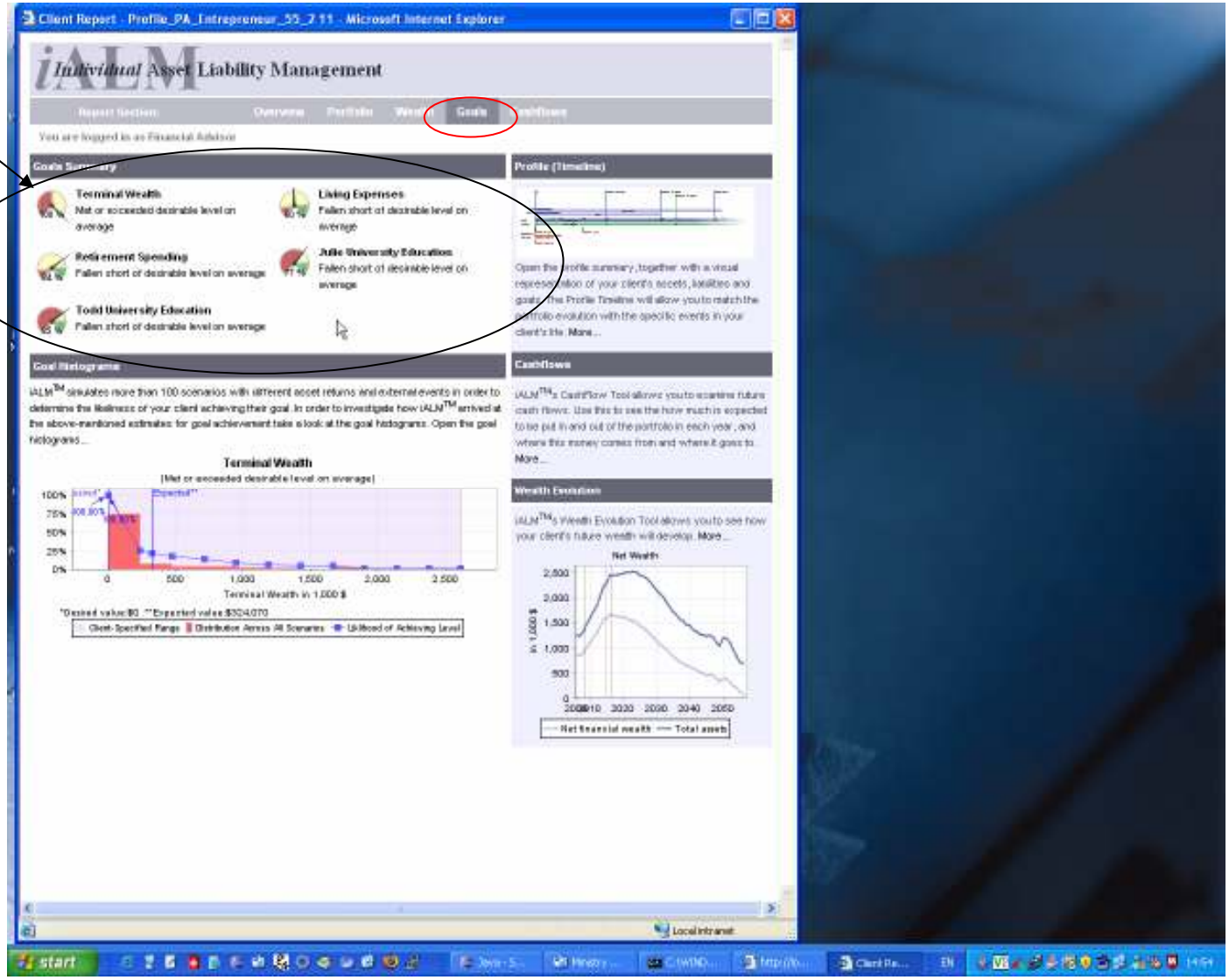
Clickable Chart

Timeline

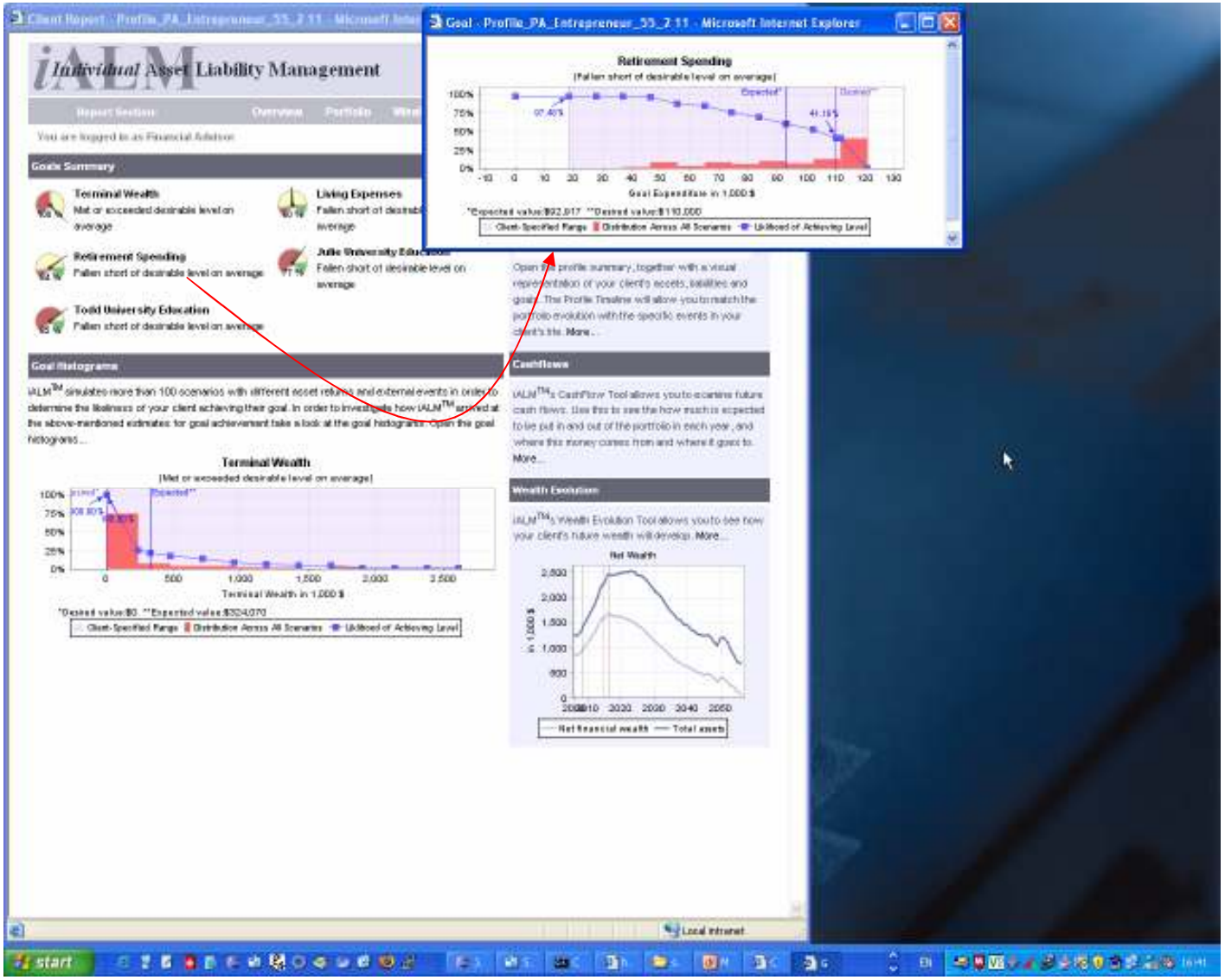
Actual Values

Goals - Overview

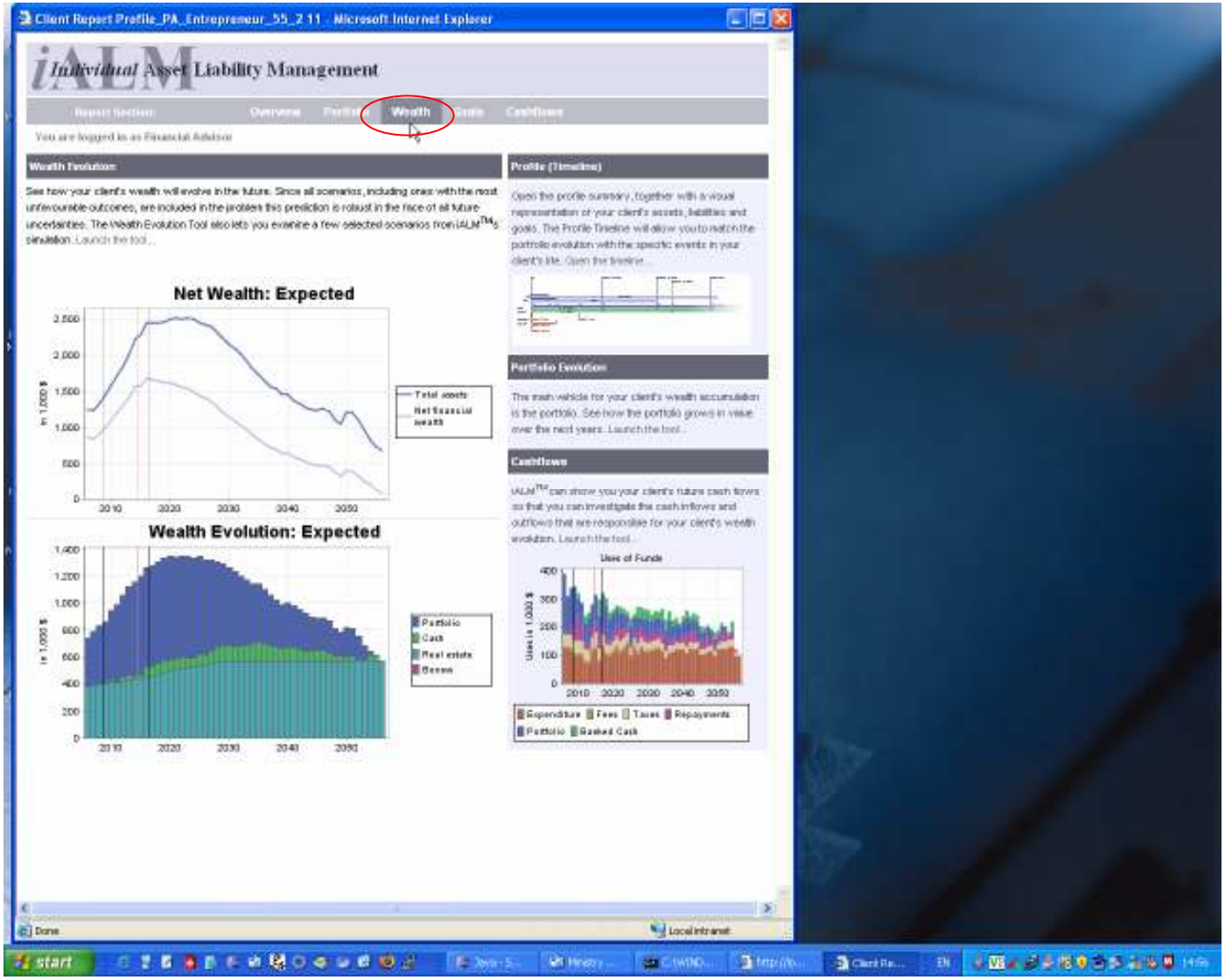
Goal Achievement at a Glance



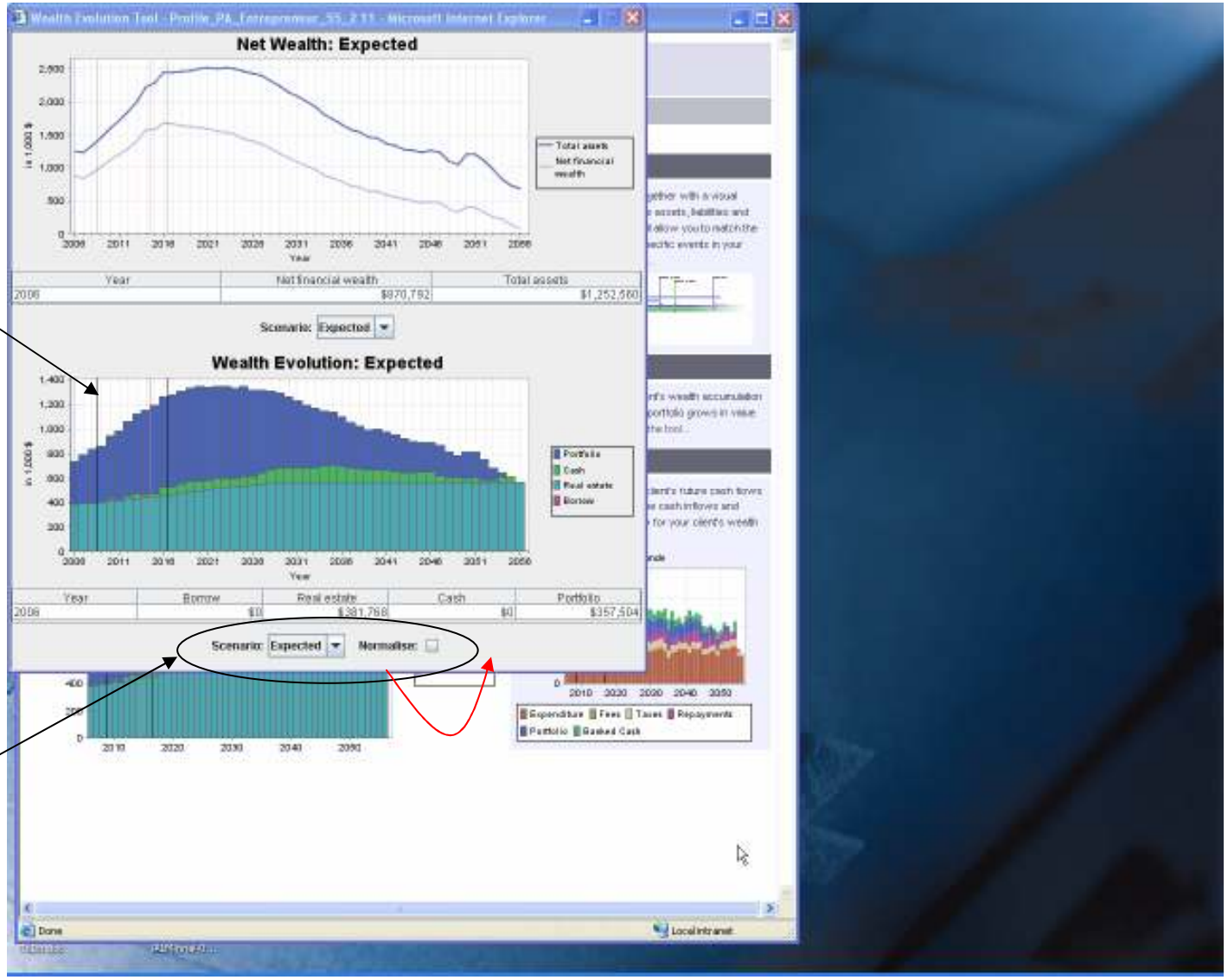
Drilling Down To A Goal



Wealth - Overview



Wealth – Interactive Graph

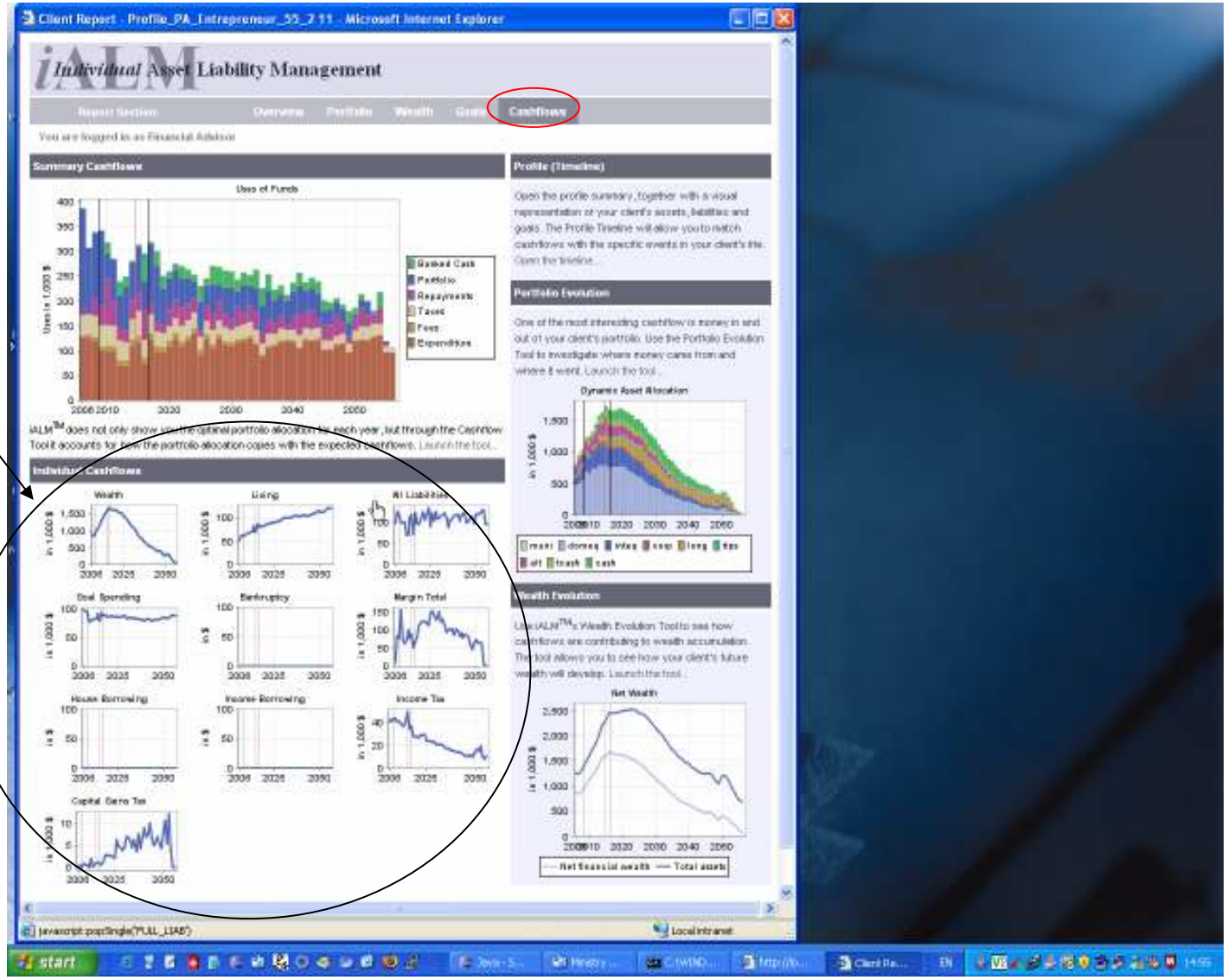


Clickable Chart

Chart Control Panel

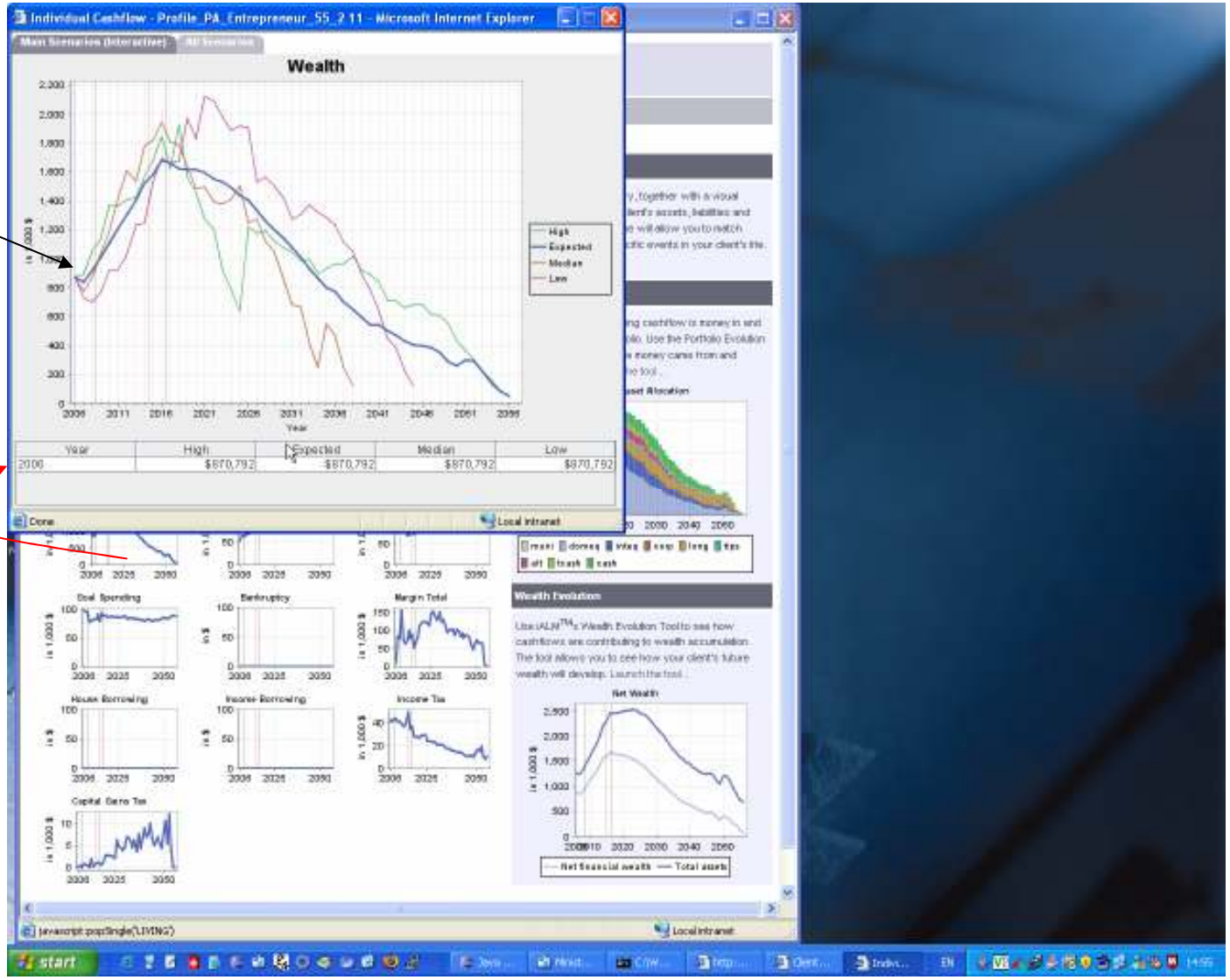
Cash Flows - Overview

See all Cash Flows at once

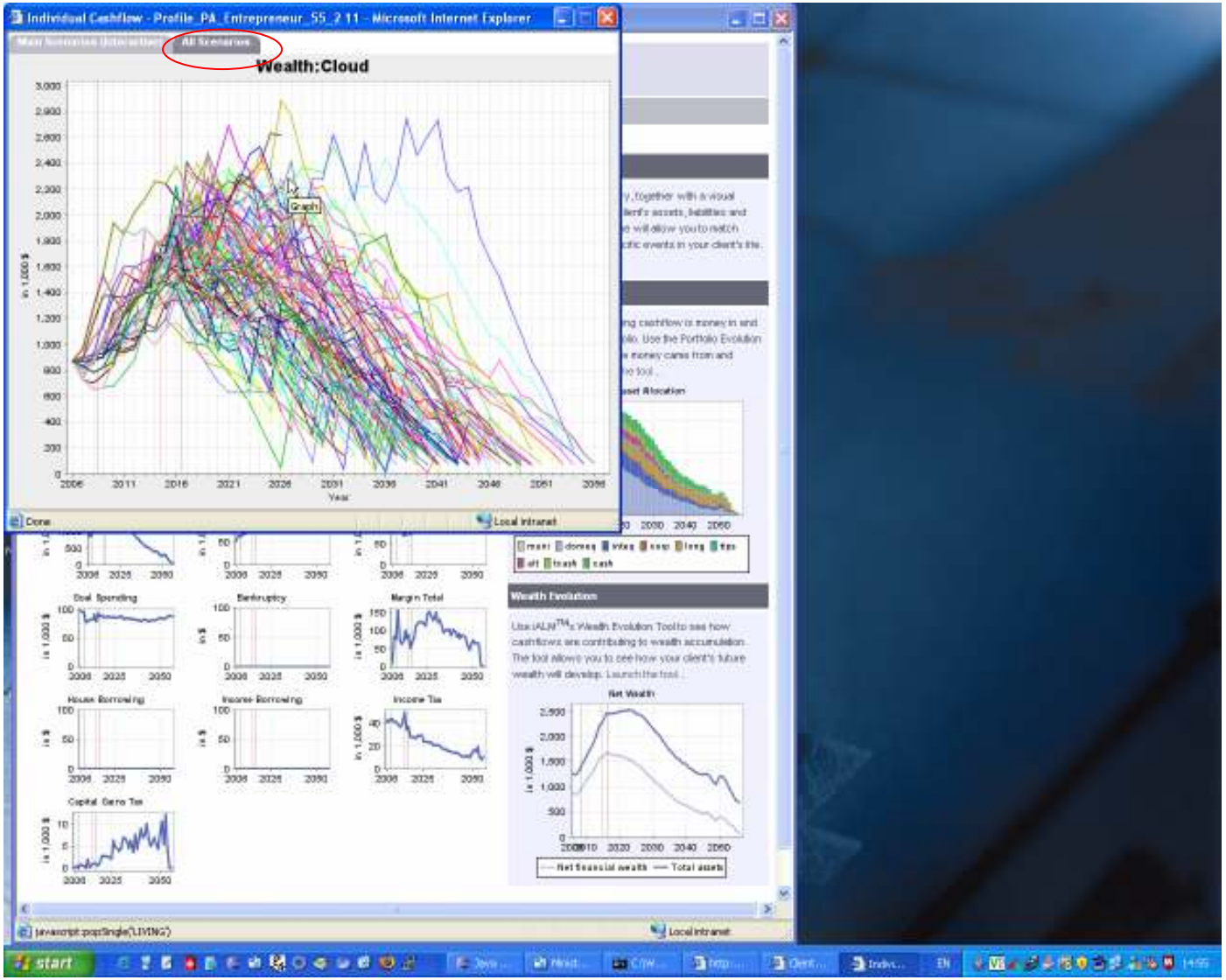


Drilling Down To Wealth

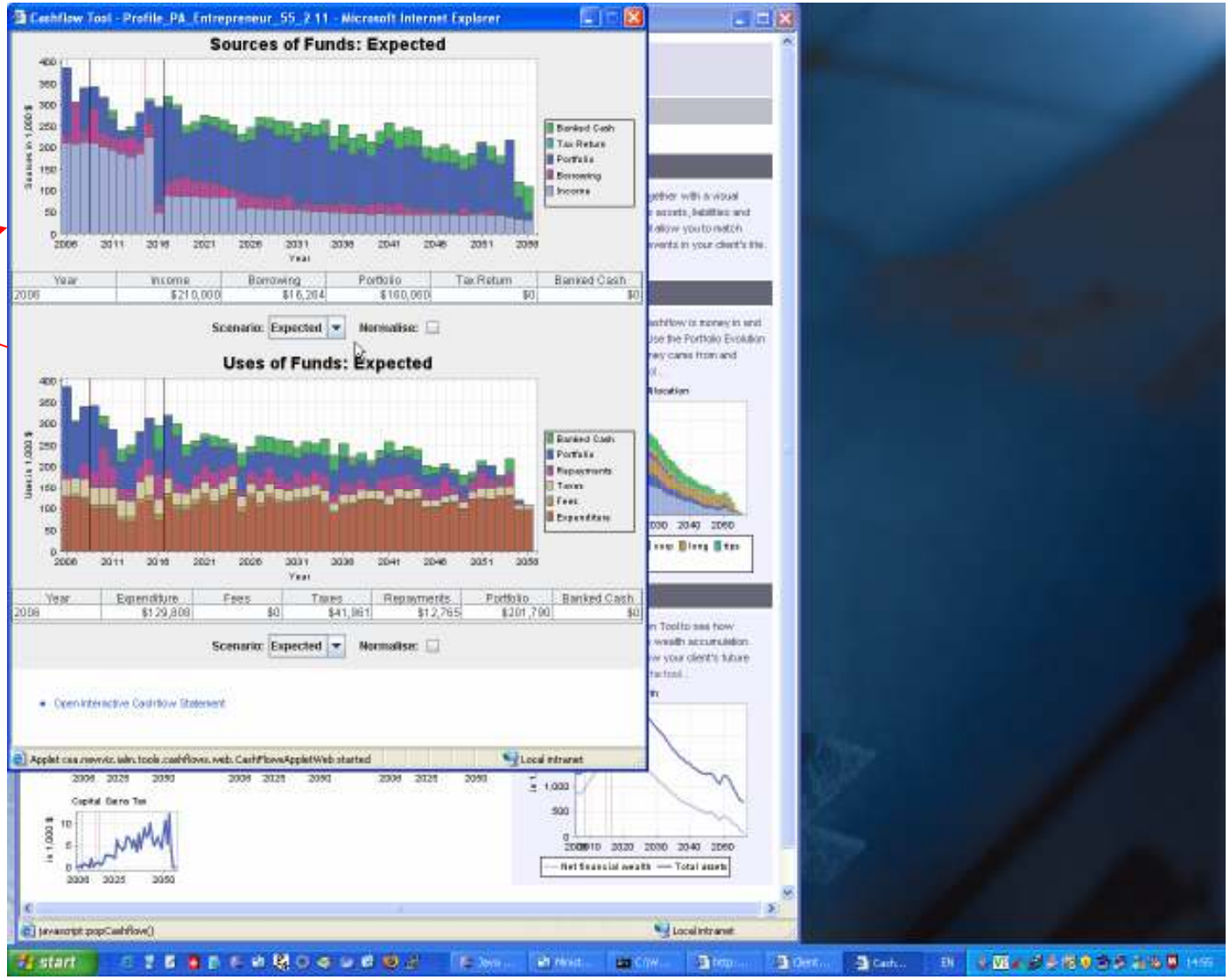
Clickable Chart



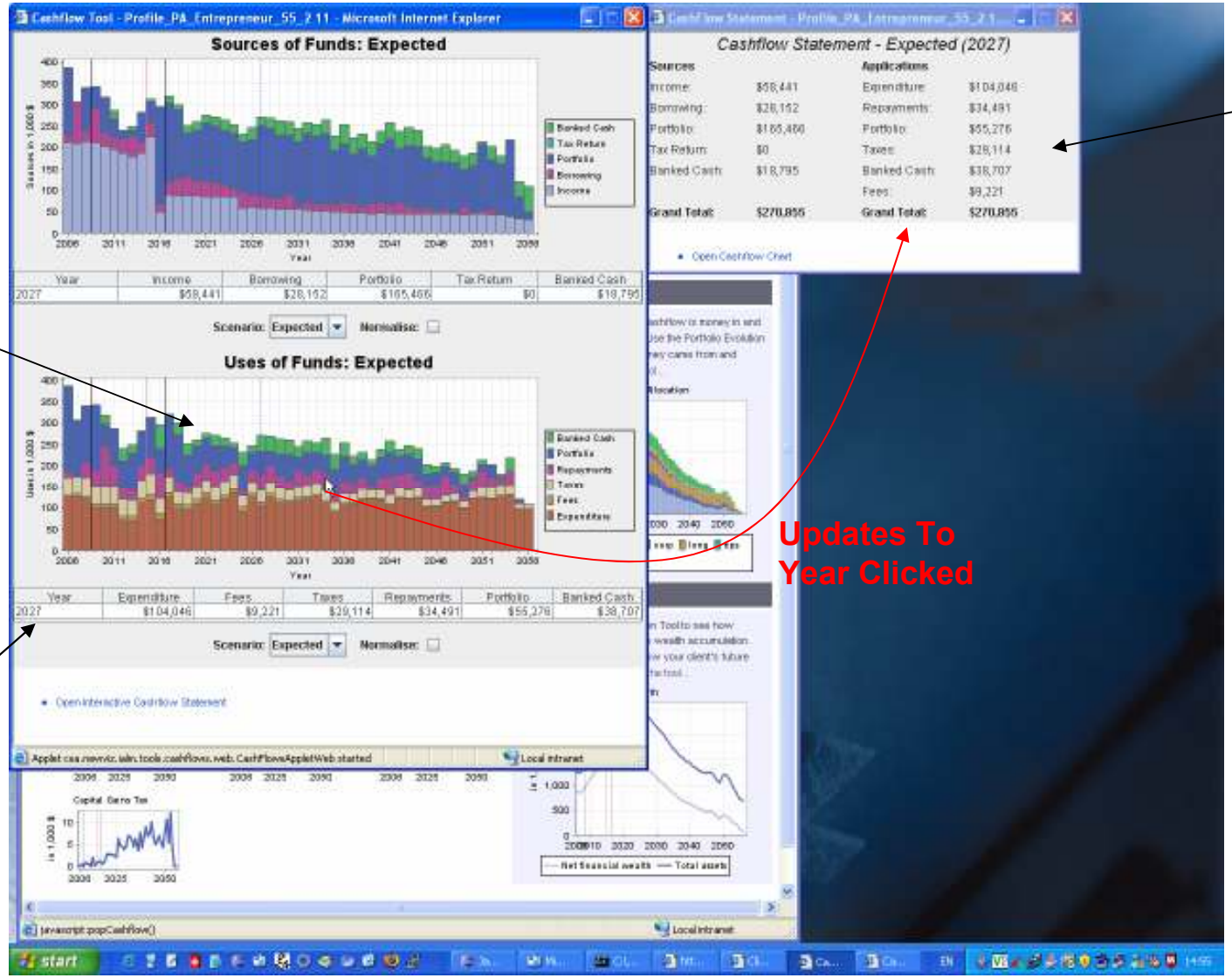
All Scenarios



Cash Flow Sources and Uses



Interactive Cash Flow Statement

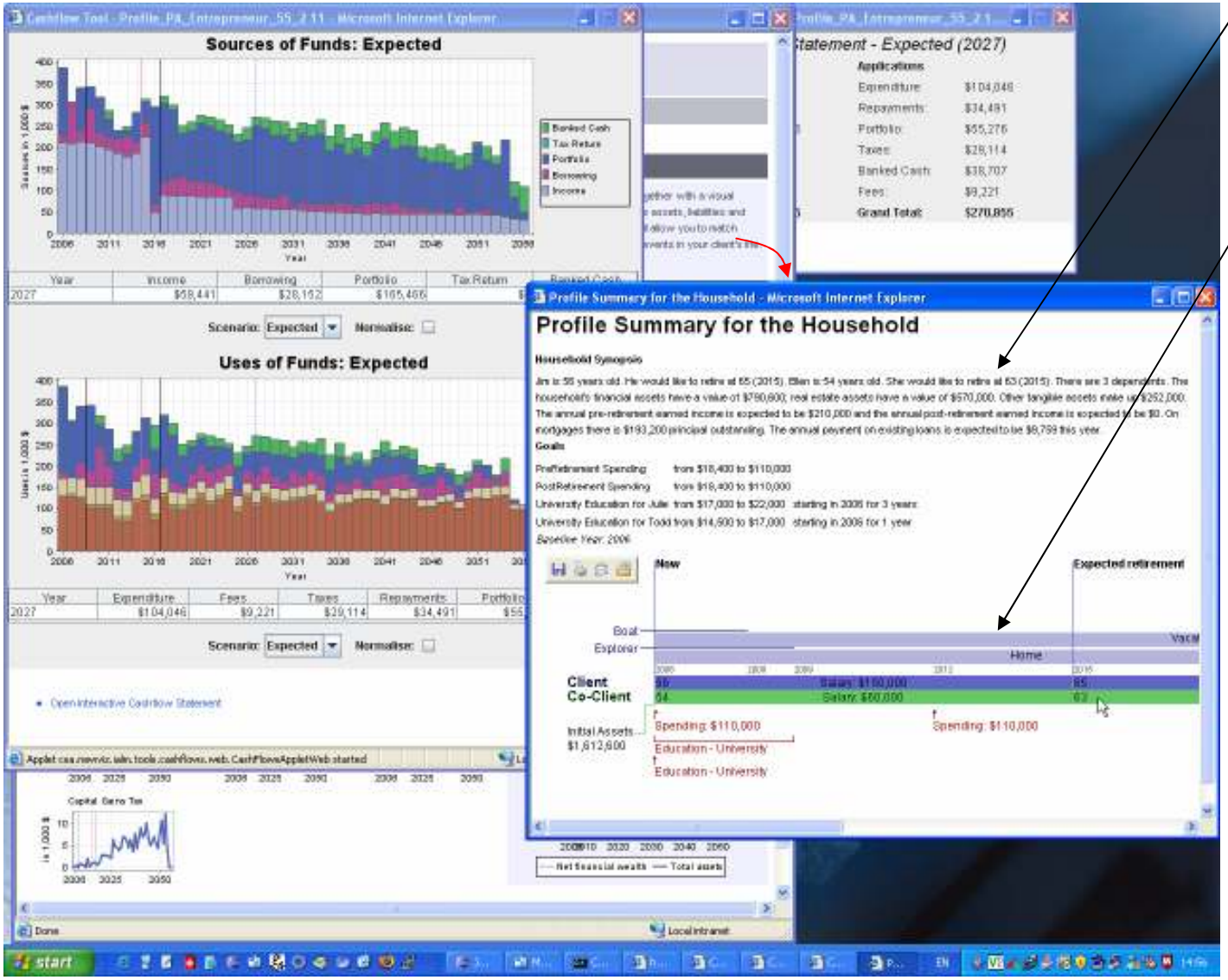


Interactive Cash Flow Statement

Clickable Chart

Values for Year Clicked

Always Available Summary



Summary of Household.

Timeline showing goals etc.