Welcome to New Look Prestwood Software

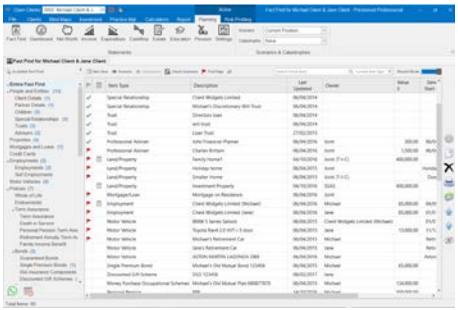
We hope you like our new look - we've redesigned our software from the ground up to make it fresher, more intuitive, and easier to use. Now you can show your clients their financial future more effectively than ever, and focus on delivering better client outcomes.

Wherever you see the YouTube logo, there's a video about that section.

Click on a thumbnail below for more information

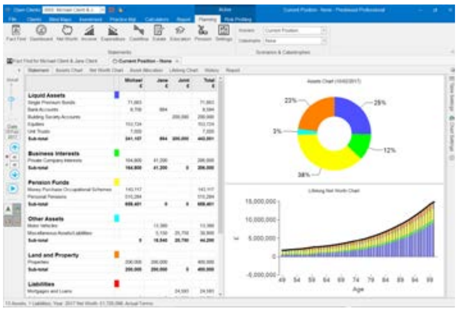
Home Screen

The Fact Find

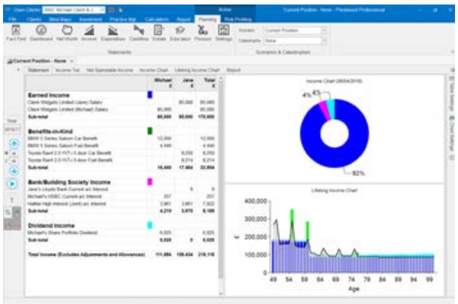


Platform Valuations

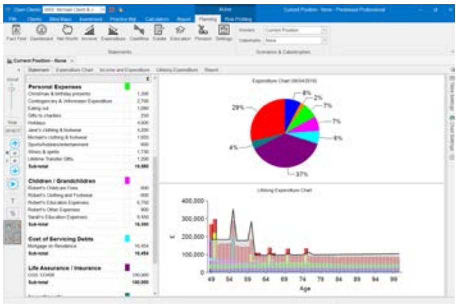
Net Worth



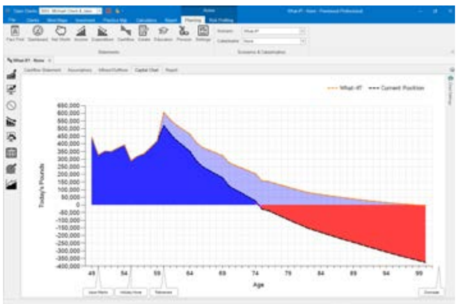
Income



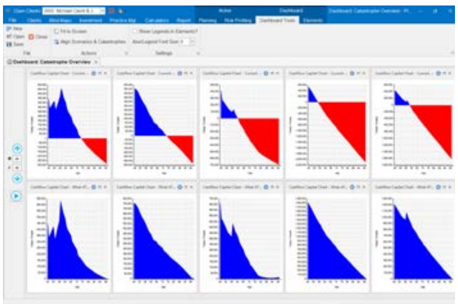
Expenditure



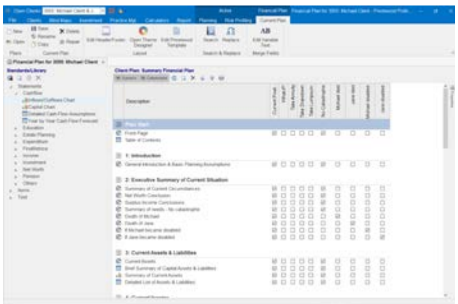
Cash Flow



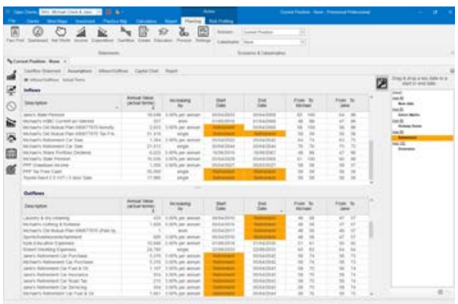
Dashboards



Prepare Plan

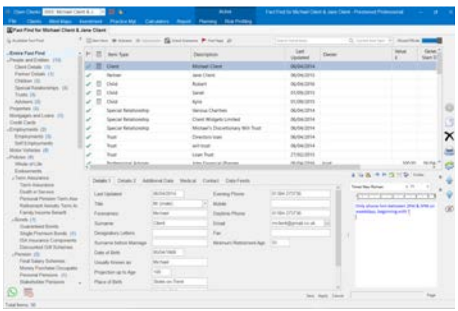


Key Dates & Settings



Branding

Custom Views



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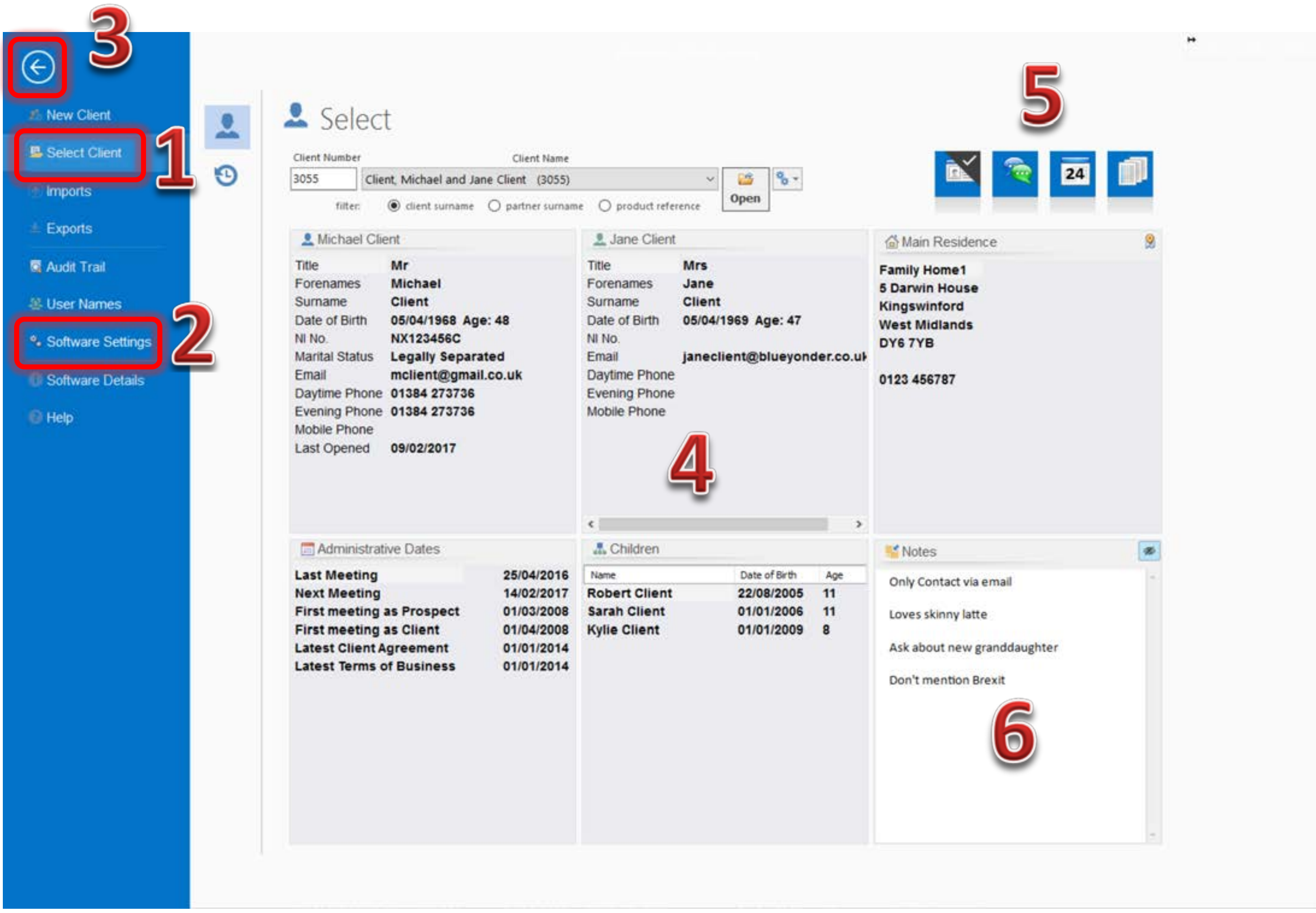
New Home Screen

When you launch Prestwood, you'll now see our 'File' menu as the home screen of the software.

Client information at a glance

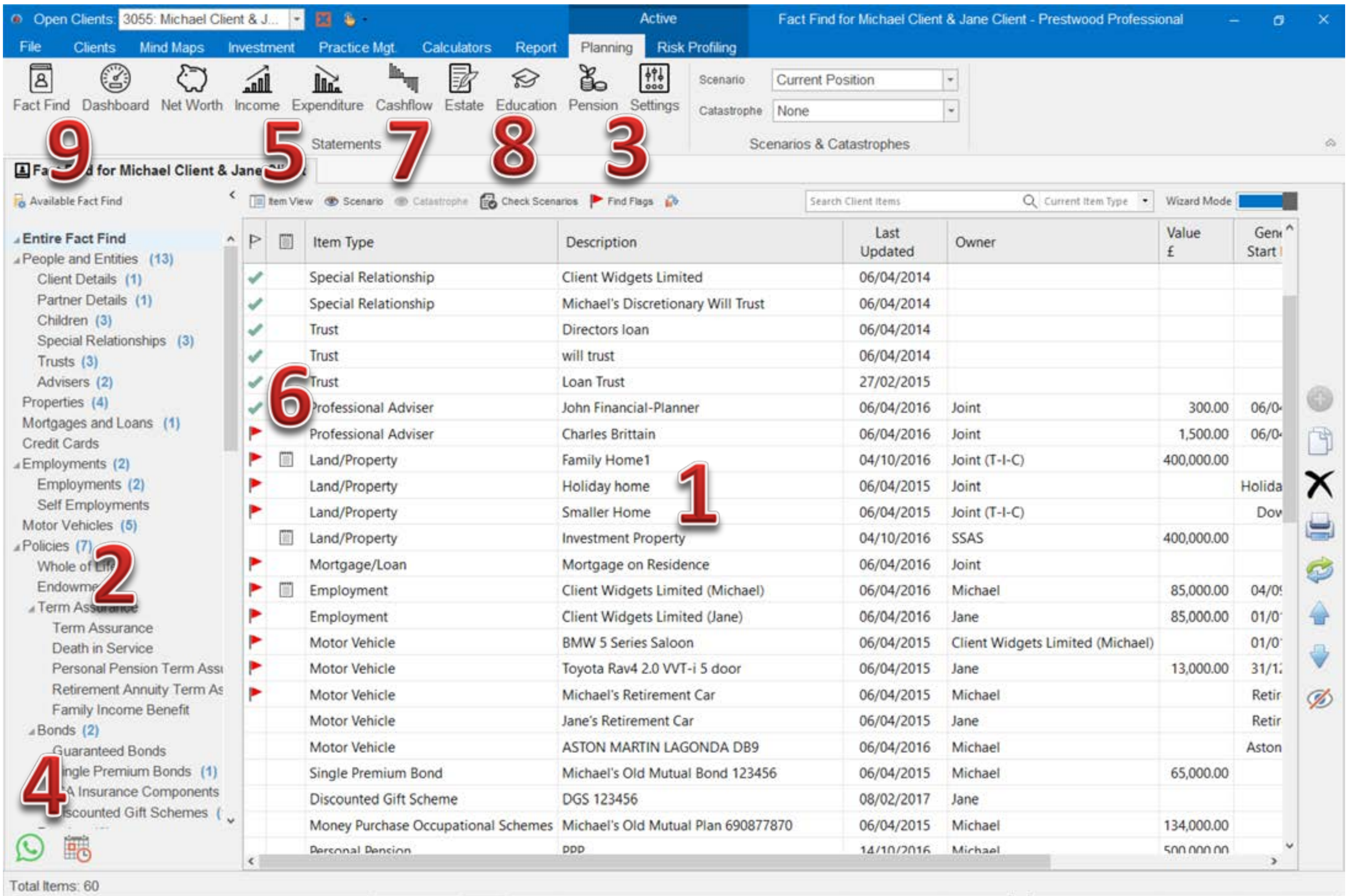
You no longer have to open a client file to access key information such as dates, names, addresses, or important notes. Simply select the client from the list and you'll get a preview of all of the essential information you might need when talking to the client or their providers.



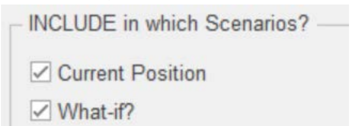
1. Select a client to view/open.
2. Customise the software to suit your preferences.
3. Click here to close the 'File' menu.
4. Essential client information at a glance.
5. Quickly view the selected client's personal details, contact history, selected fact find items or diary dates.
6. **Quick notes**. Note those things you'd like to be instantly reminded about when selecting the client. If the notes are sensitive, you can hide them by clicking the eye icon.

The Fact Find

This replaces the old Item Control screen. The convenient toolbar on the right-hand side allows you to create new items, as well as print, copy, or delete existing items.



1. View information immediately in a **clear, searchable and sortable grid.** Double-click as normal to open the fact find item.
2. **Browse and filter** using the familiar "Item Tree".
3. **Flag items for review**, so you can come back to them later.
4. Jump straight to **Contact History**, or **Diary** entries for the current client.
5. **Preview items** directly from the Fact Find screen, as you would with an email message in Outlook .
6. **See which items have notes written in them.** Choose to auto-view them when items are previewed.
7. Opt to **view which scenarios and catastrophes** each item is in on the right-hand side of the table**.** Note that **<u>we now tick to INCLUDE</u> in scenarios and Catastrophes.**



8. Very useful **scenario checking tools**. View only items in the scenario you're in, all items from all scenarios or just the differences between scenarios.
9. Hide all the fact find items types that your client doesn't have. Hide the clutter for even faster updating prior to meetings and for a **more personal look during the meeting**.

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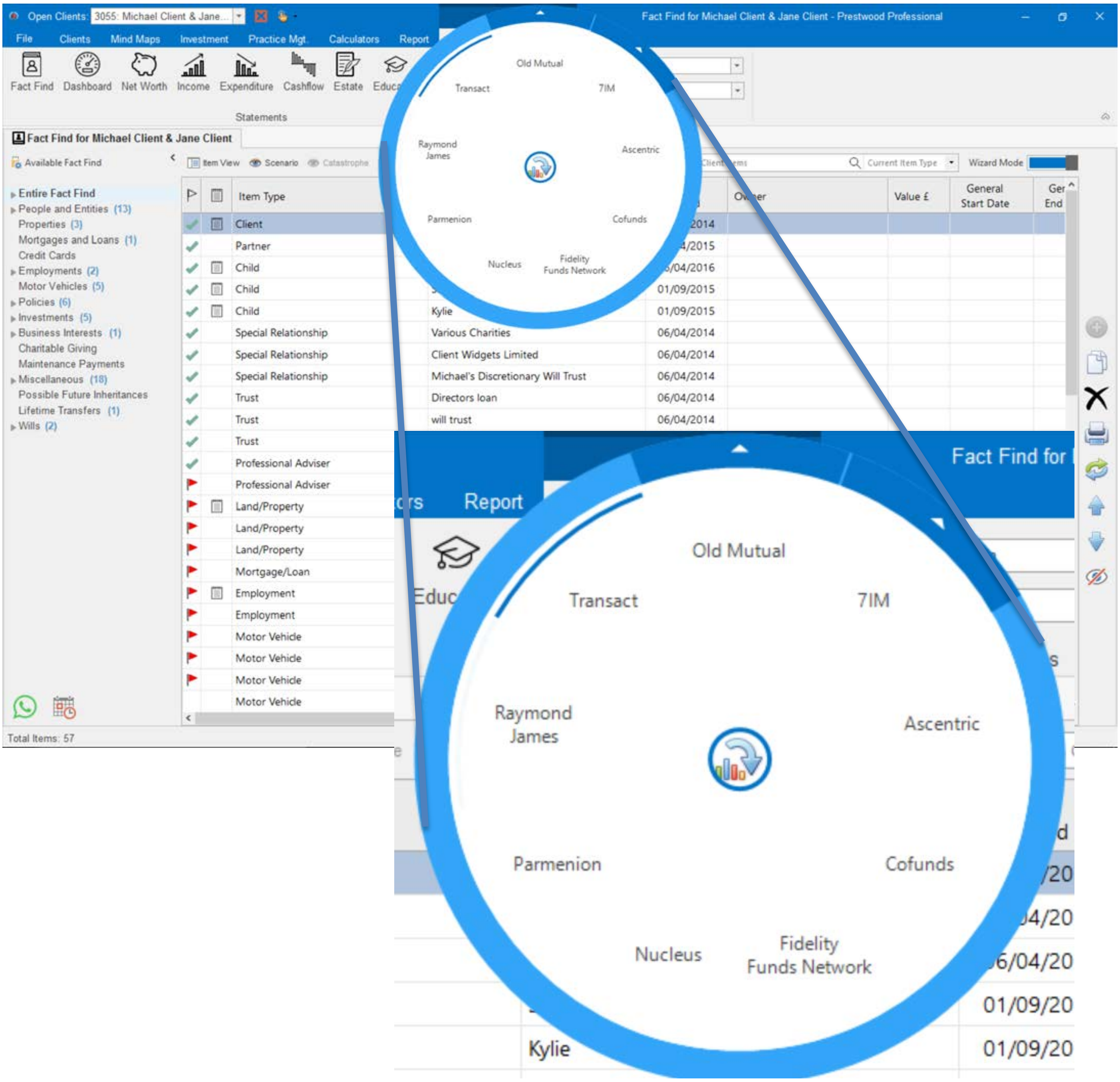
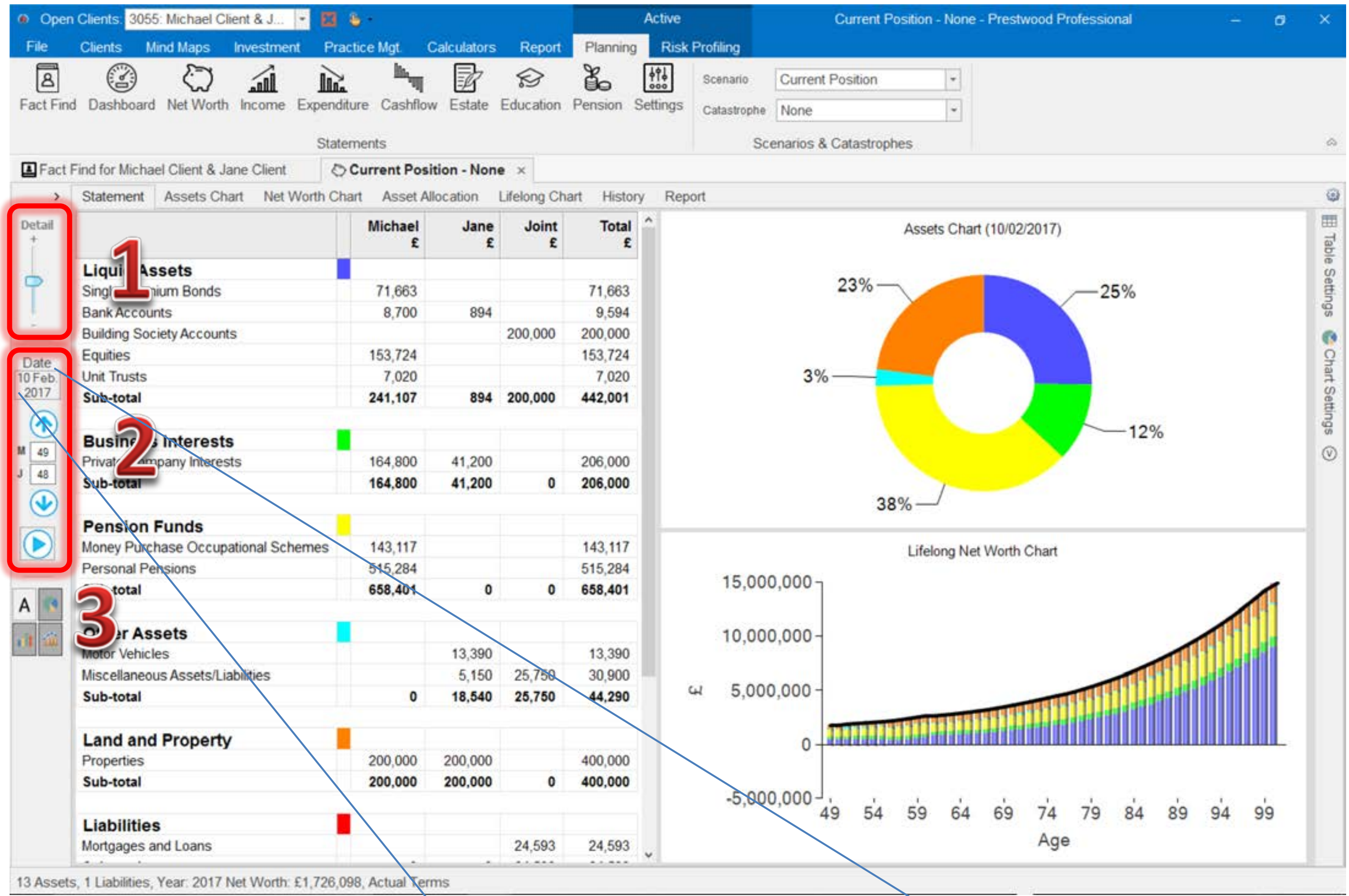
Platform Valuations

You may have noticed a new button next to the Find Flags option at the top of the Fact Find table  . This button allows you to **import valuations** from your preferred wrap platform, directly from the Fact Find screen, to update the client's products.

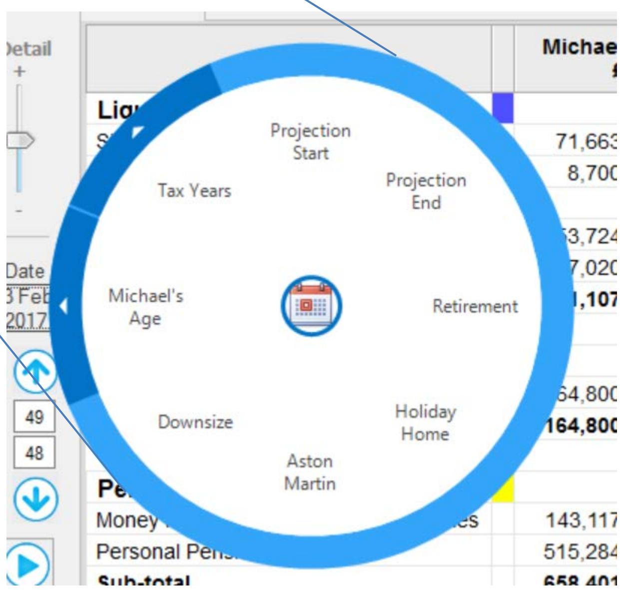


Net Worth

We've revamped and simplified all of our statements, adding new customizable layouts that allow you to show your client exactly what they need to see, all in one place.



1. Choose the **level of detail**, from Full Detail to Summary, with a simple slider
2. Our fantastic **new date controls** allow you to show the clients their Net Worth at any age, scroll through the years using either the client or their partner's age, or **play a slideshow**. Click on the calendar to jump to any key date.
3. **Customise your layout** – pin the Assets Chart or Lifelong Net Worth chart to the Net Worth Statement, or switch between Today's and Actual Terms using these toggles. On the Net Worth statement, we've also added a toggle which allows you to show the client's "bottom line" Net Worth (i.e. less any liabilities), overlaid over the Lifelong chart.



You'll now find these same controls on each of our statements, allowing you to seamlessly and intuitively navigate between them, and adding a sense of continuity to the client experience.

There's also a handy summary, right at the bottom, which always displays the headline information, regardless of what screen or chart you're viewing.

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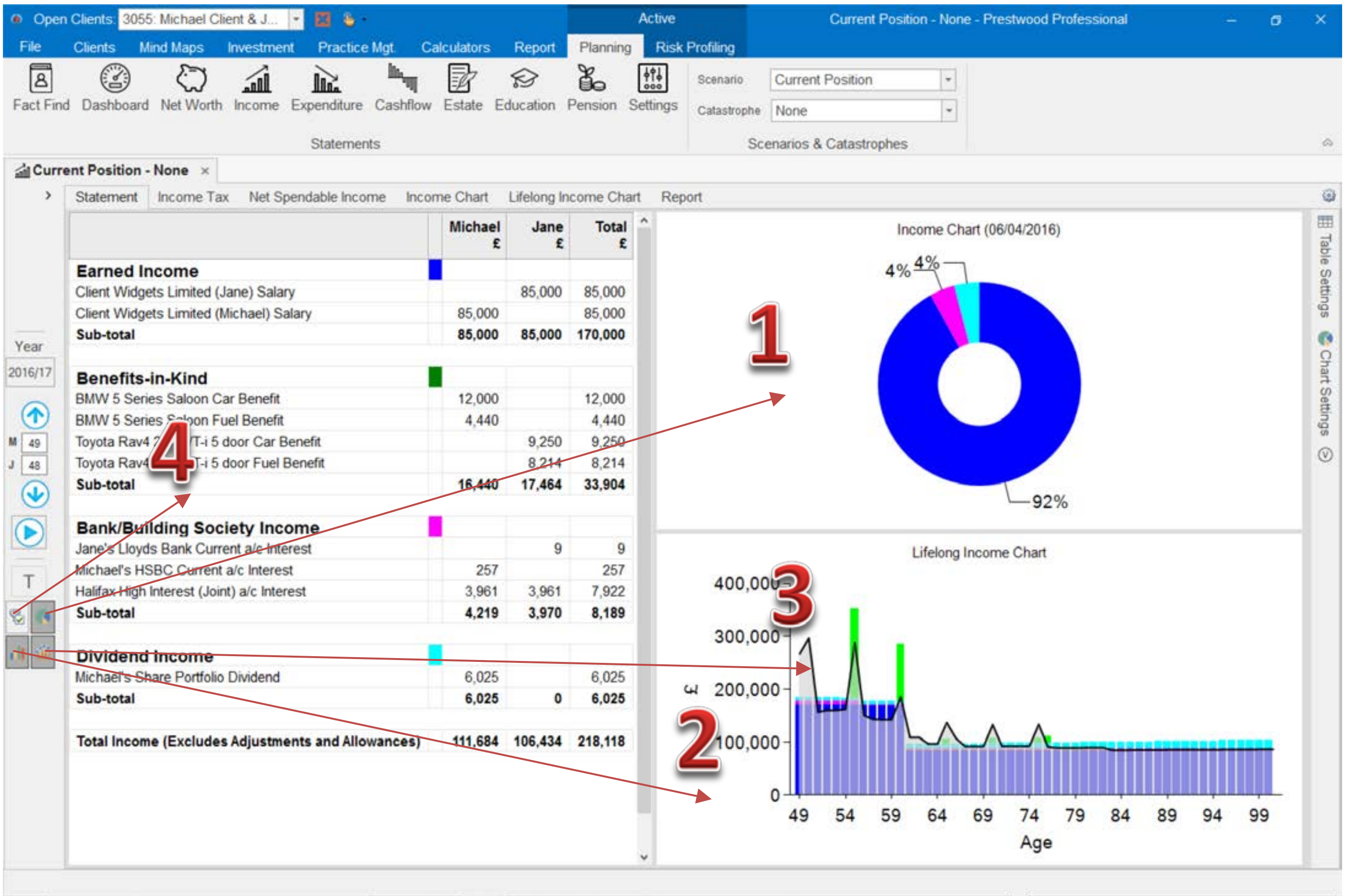
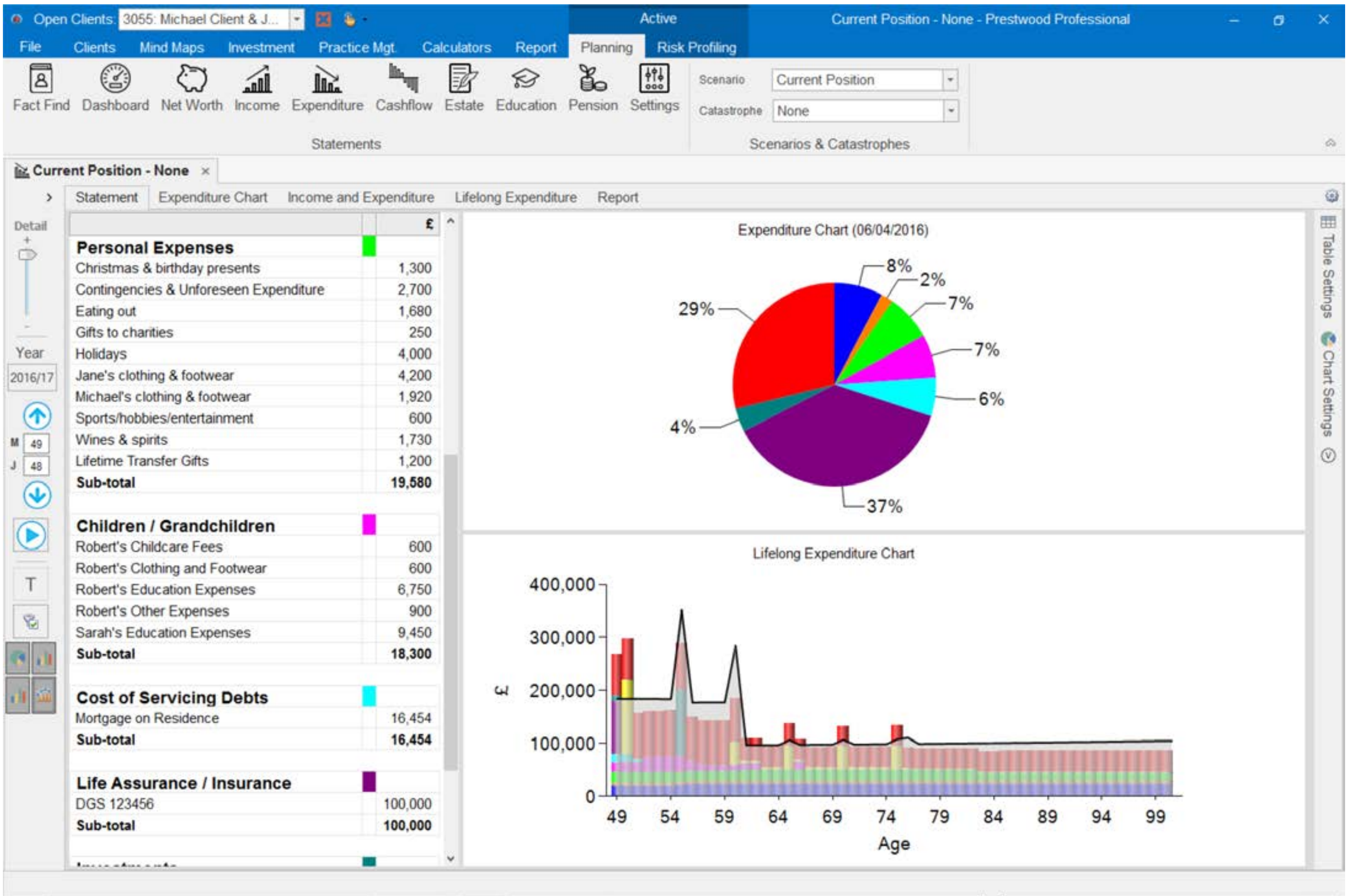
Income

You'll notice that all the relevant buttons for customising what is shown are in the same places on all the statements.



1. **Customise your layout** – pin the Income Chart …
2. …or Lifelong Income chart to the Income Statement using these toggles.
3. On the Income statement, we've also added a toggle which allows you to **overlay the client's lifelong Expenditure on the Lifelong Income chart**.
4. **Filter out any one-offs**, to give you a feel foe the clients regular, annual ongoing income(and expenditure if overlaid).

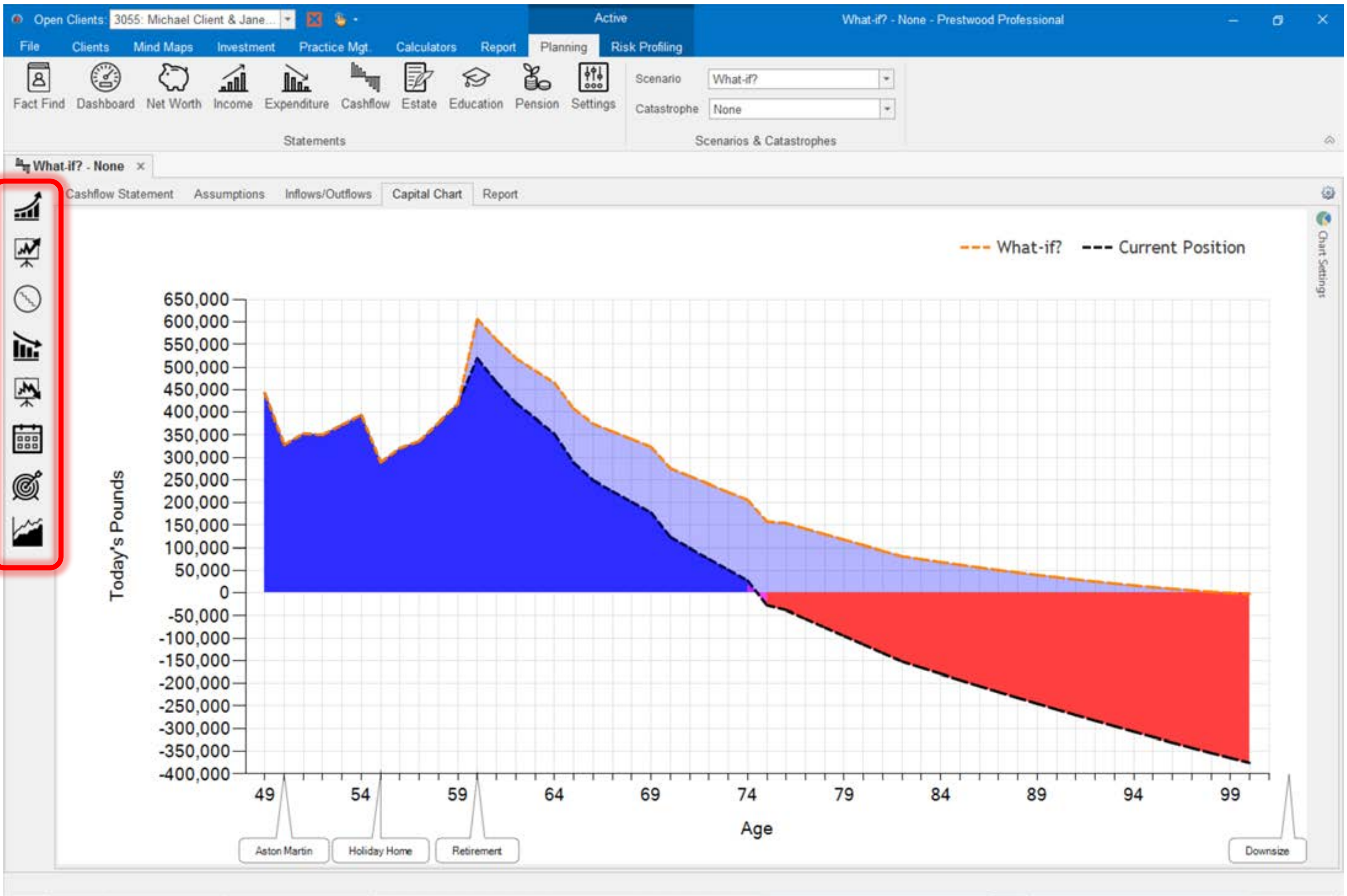
Expenditure



1. **Customise your layout** – pin the Expenditure Pie Chart …
2. …or Lifelong Income chart to the Expenditure Statement using these toggles.
3. On the Expenditure statement, we've also added a toggle which allows you to **overlay the client's lifelong Income on the Lifelong Expenditure chart**.
4. **Filter out any one-offs**, to give you a feel foe the clients regular, annual ongoing income(and expenditure if overlaid).

Cash Flow

We've made the cash flow tools more visual and moved them all to the same toolbox. **The new Fact Find Targeter** replaces the targeting tools from the What-if Cashflow Assumptions window and walks you through how to do it.



	More Inflows Calculator Calculate a lump sum or regular amount of earned, dividend or tax-free income to prevent cash flow going negative.		**Rate Stepper** See the immediate impact of increasing or decreasing the assumed growth rate on selected investment types.
	More Protection Calculator Calculate an additional lump sum or regular amount required to prevent cash flow going negative when a catastrophe is selected.		**Fact Find Targeter** Calculate what an existing inflow or outflow value needs to become in order to achieve a required cash flow capital sum at any age.
	Overlay Chart Overlay another scenario on this chart to view any differences.		**Capacity For Loss** Simulate a market fall on selected investment types and see the effect on the cash flow.
	Growth Calculator Calculate the required growth rate on selected investment types to prevent cash flow going negative.		**More Expenditure Calculator** Calculate how much more could be spent as a lump sum or regular amount without the cash flow going negative.
	Overlay Chart Overlay the Capital chart on the inflows/Outflows chart.		**Key Date Calculator** Calculate the earliest a key date can be without the cash flow going negative.

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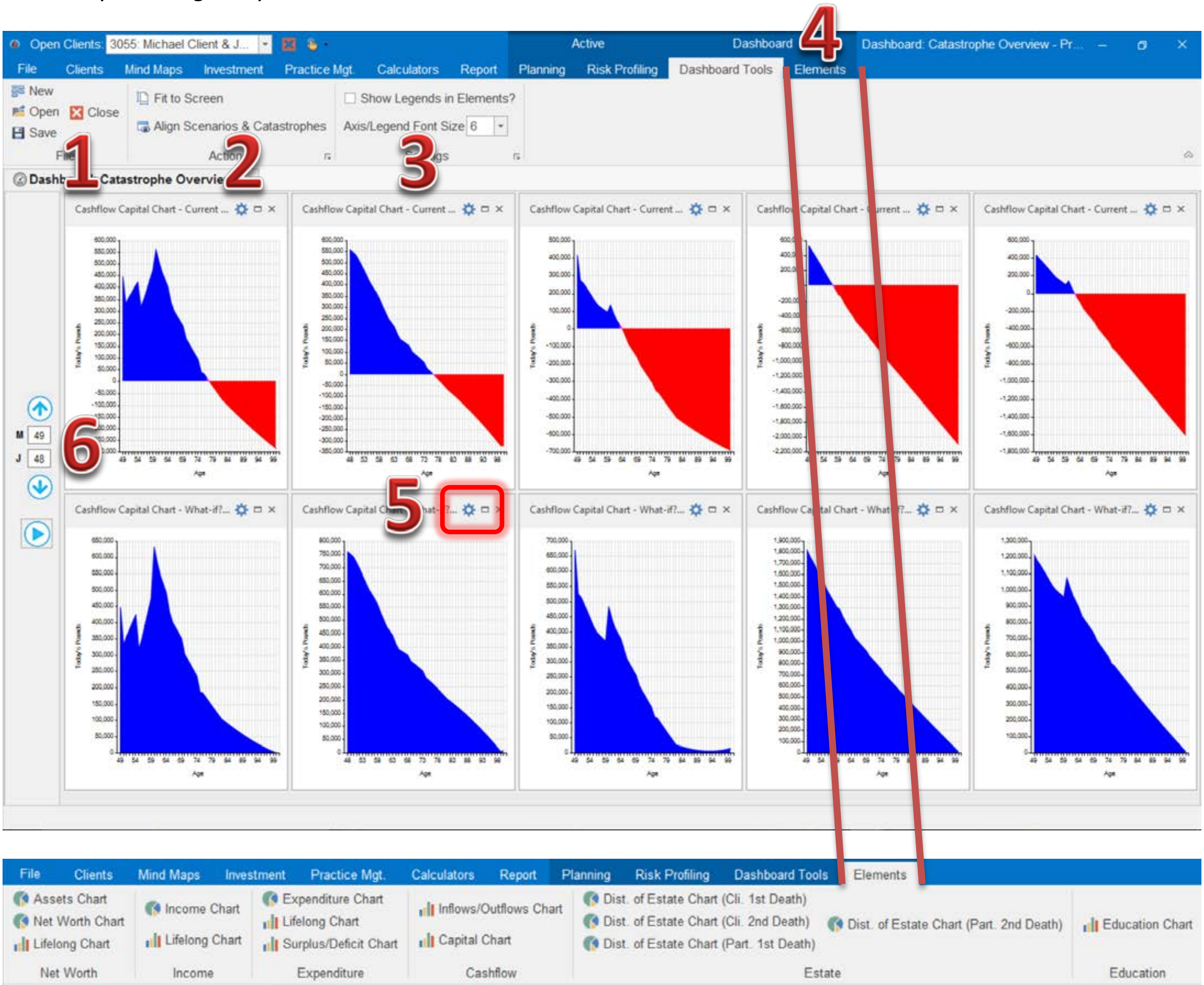
Dashboards

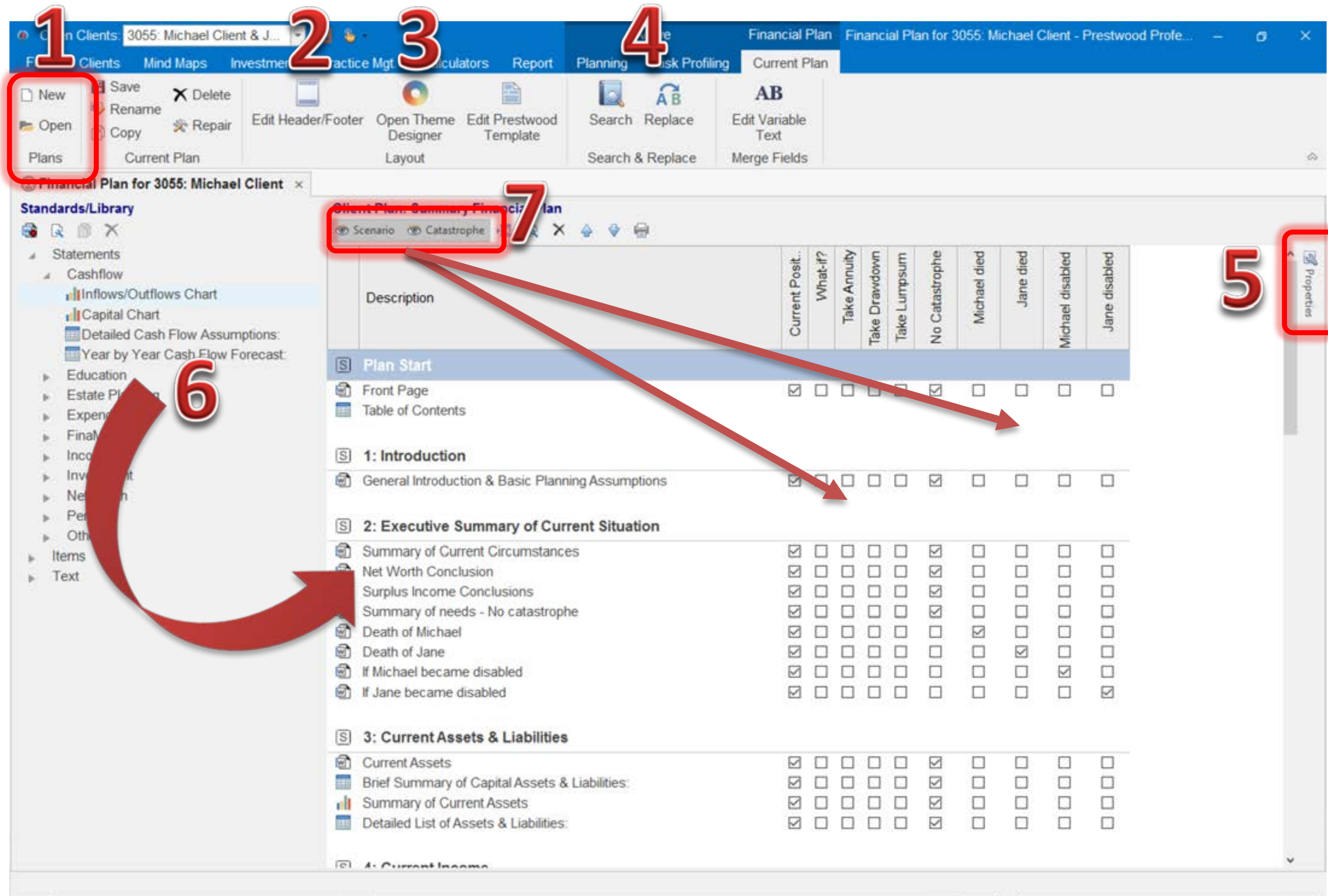
Now you can design your own dashboard statements to give you an overview with any charts from all scenarios and catastrophes. Below is a 'Catastrophe Overview'. The top row shows the Current Position for the 5 catastrophes (none, 2-death, 2-disability). The bottom row shows how the What-if equivalents are looking. This saves you constantly checking every individual screen.



1. Open, and create as many layouts as you wish. The last one you open will be remembered and open first next time, unless you close it!
2. Autofit all the charts to your screen and make all the scenario and catastrophe selections the same.
3. Show/Hide chart legends and choose the font size that suits the dashboard best.
4. Select the 'elements' tab and add charts to build your own dashboard.
5. Change the scenario/catastrophe for an individual chart element.
6. Scroll up and down through the clients' ages and what the charts change.

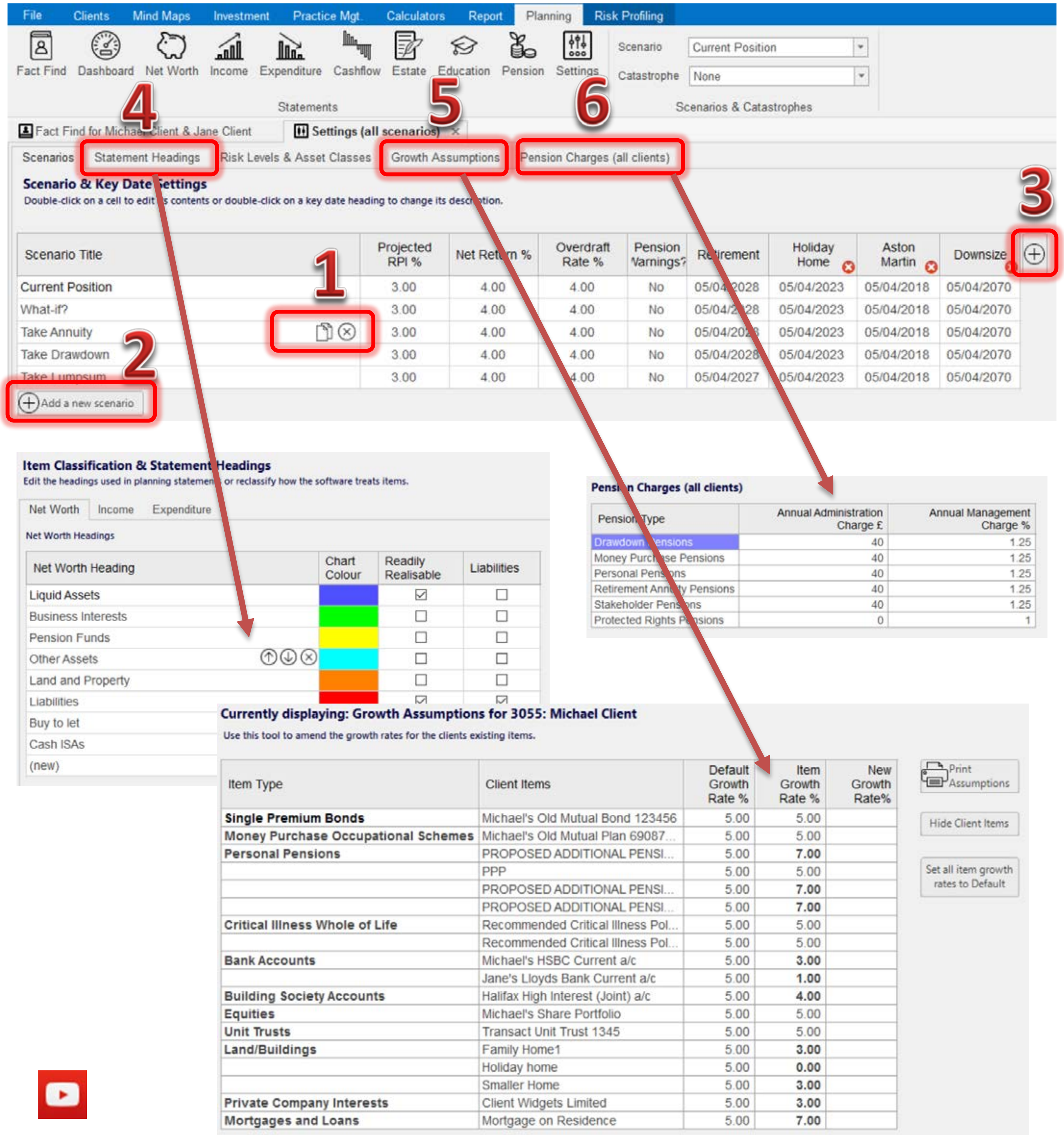
Financial Plan

1. Create or open another plan layout.
2. Design your Microsoft Word page layout and brand the header/footer with your logo.
3. Use the [Theme Designer] to make charts and tables print in your fonts, styles and colours.
4. Search & Replace words from the entire plan.
5. Set your preference for each element of the plan. It could be when to start a new page or choosing settings for a cashflow Capital Chart (market fall, overlay another scenario etc.).
6. Drag and Drop Statements, Fact Find information or text from your personal library into the plan.
7. View the scenario/catastrophe settings.



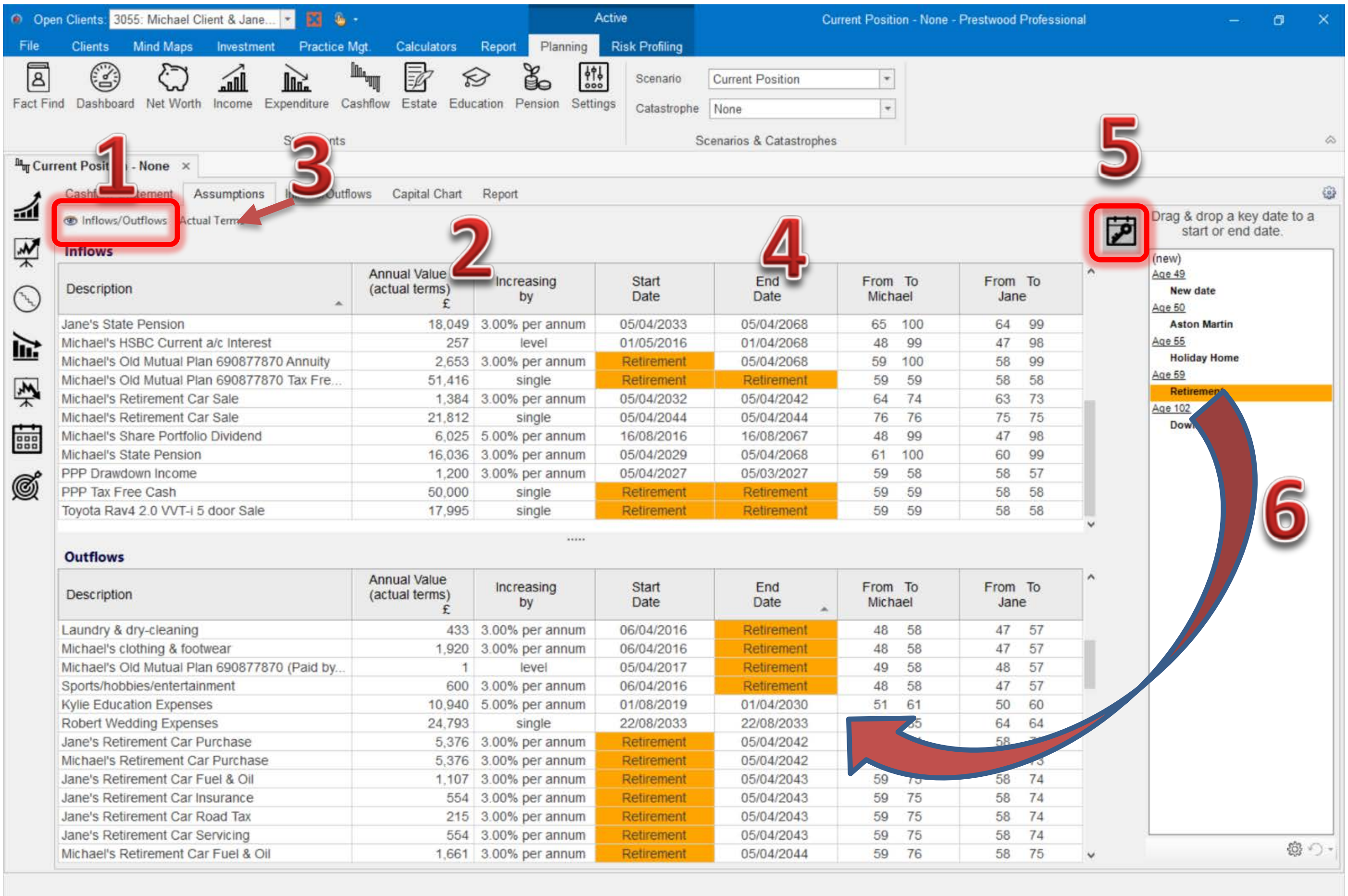
Key Dates & Settings

1. Make an exact copy of another scenario or delete one.
2. Add a new scenario.
3. Add a Key Date with ease.
4. Rename, Add or Remove headings on the Net Worth, Income & Expenditure Statements.
5. See and adjust all the growth rates for your client's assets in one list.
6. Enter your preferred pension charges, so that say, a pension with a growth rate of 5% and charges of 1% will enjoy real projected growth of 4%.



The Assumptions tab of the Cashflow Statement has improvements too.

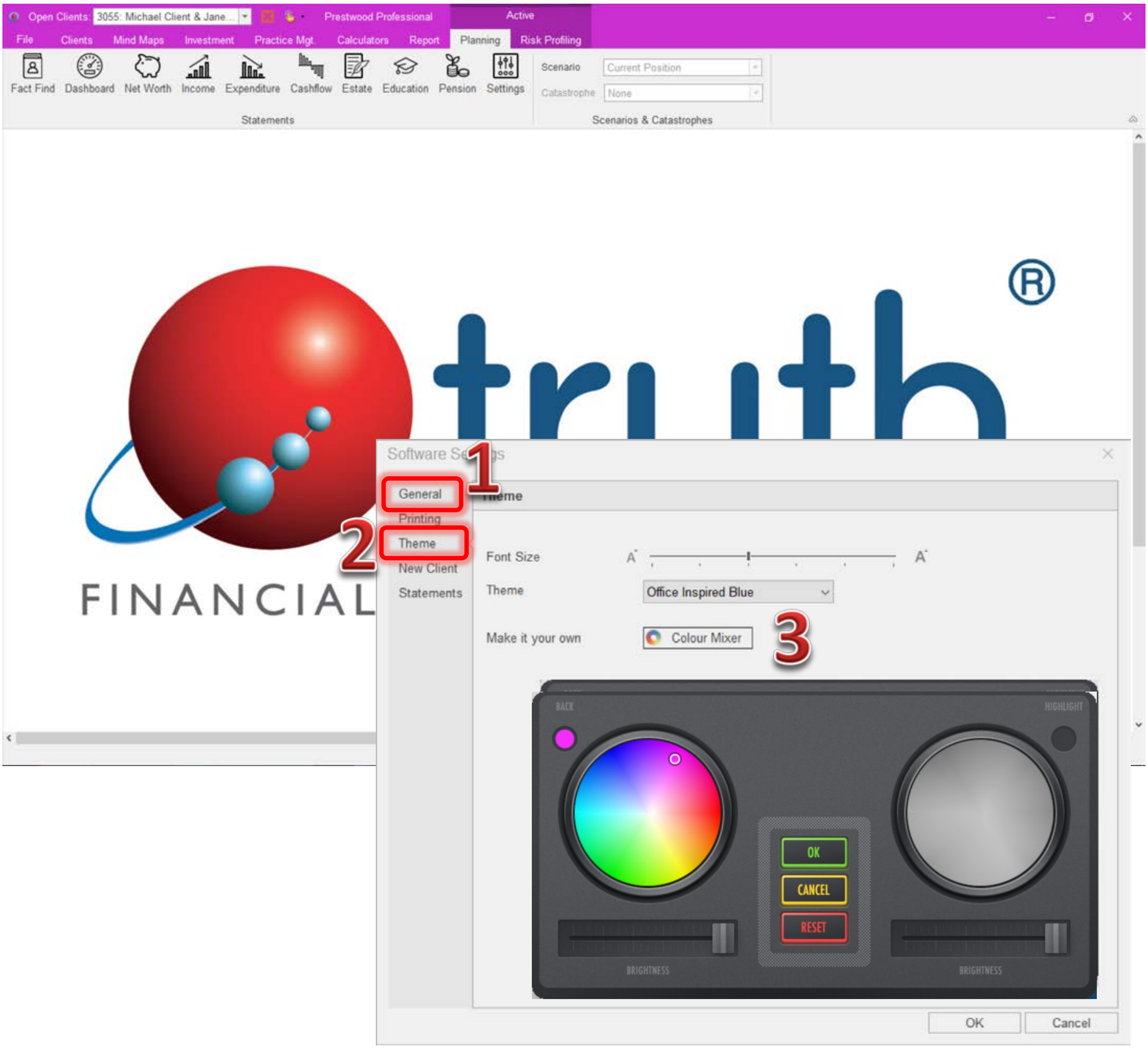
1. There are now separate tables for inflows and outflows, but you can toggle between one or the other here.
2. Click on a column heading, to sort by that column (values, descriptions, dates – great for checking data).
3. You can choose to see values in Actual or Today's Terms.
4. We've added an End Date column.
5. Open the Key Date Toolbox,  and select a key date to highlight all the fact find items that it's being used on.
6. Drag and drop a key date on to any relevant start or end date.



Branding

Give the software a background image/logo and tweak the style and colours to reflect your corporate branding.

1. From the File menu, select Software Settings. **Upload your logo** from the General section.
2. **Select a theme**.
3. Make it your own with the **Colour Mixer.**
4. **Choose a screen font size** to suit you and your clients. This doesn't affect the font size for printing.



5. Put your own logo and fonts in the header/footer of each printed page (just like the top of this page) from the [Prepare Written Plan](#) menu.

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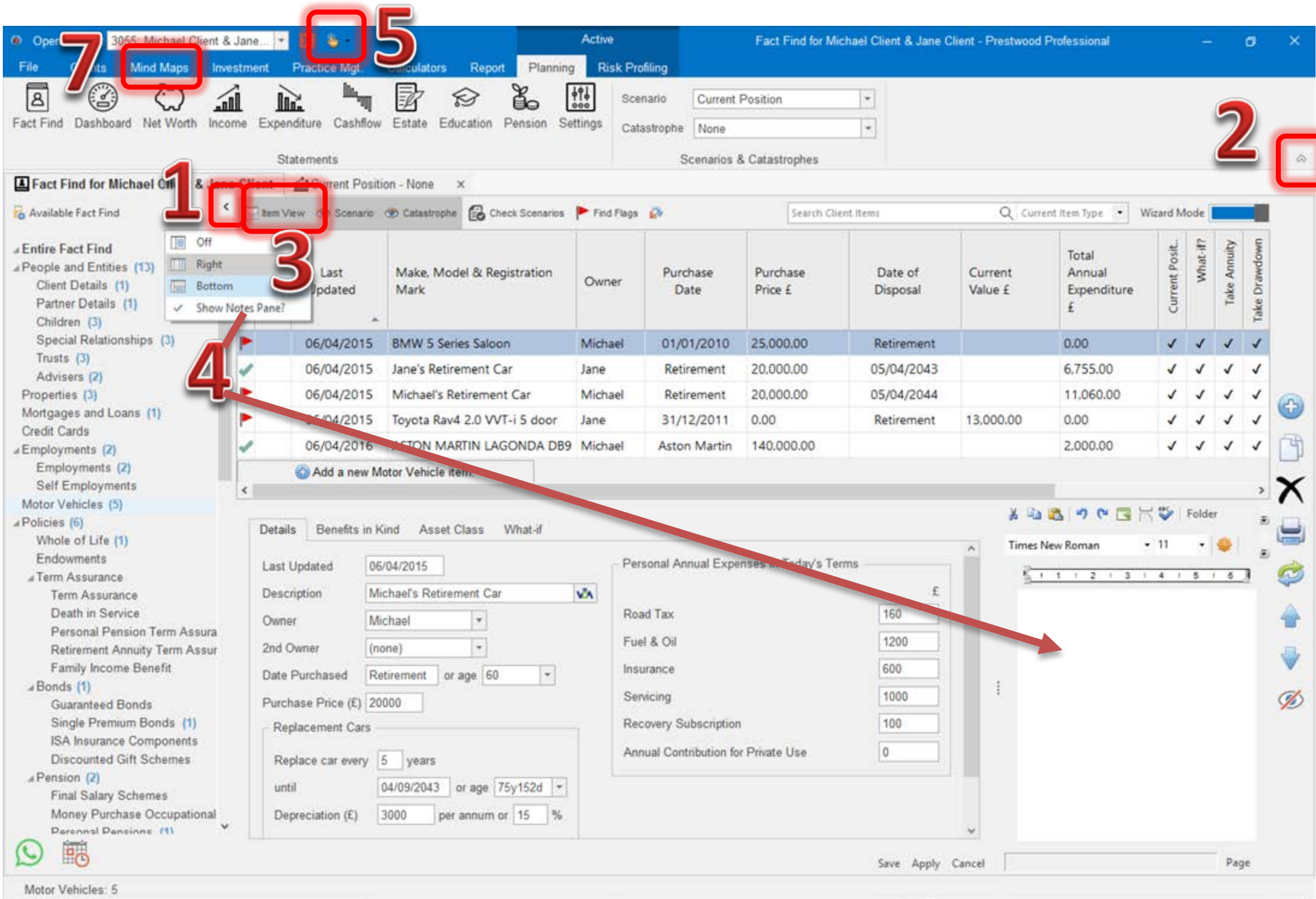
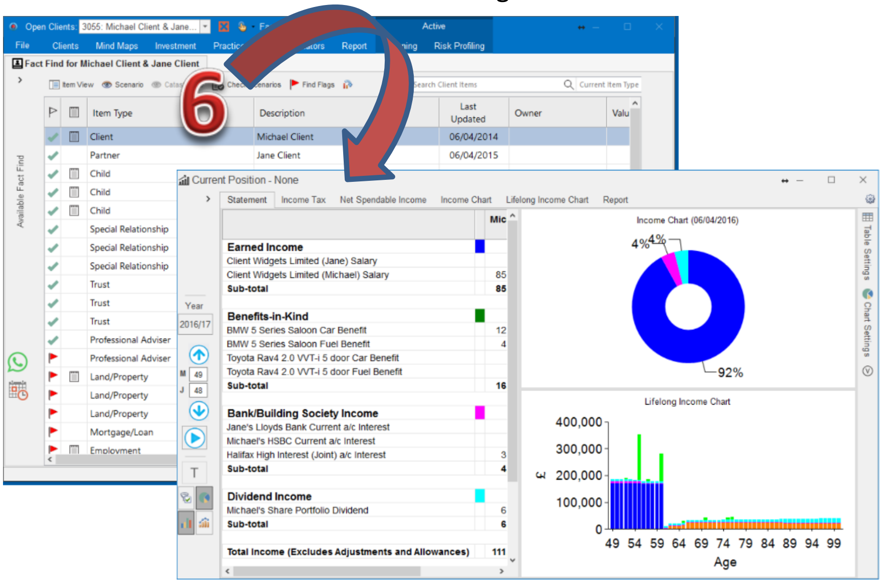
Custom Views

Set the layout to suit your preferences.



1. Collapse/Expand the Fact Find bar.
2. Collapse/Pin the ribbon menu.
3. Choose to display fact find items docked to the right-hand side, bottom or not at all
4. Auto view item notes when an item is docked.
5. Toggle the layout between Mouse or Touch Screen mode, in which the controls are enlarged.
6. Drag statements and items out of the main software to display separately or to another screen.
7. Use your own Mind Map menus. Switch them on in Software Settings.



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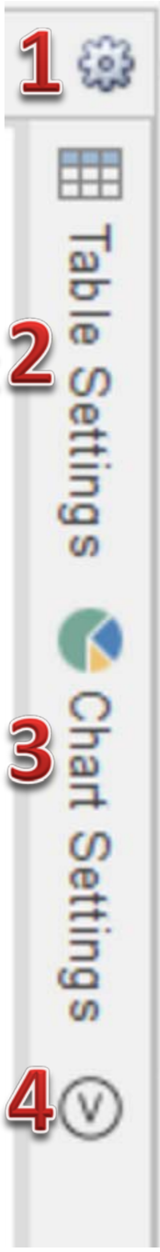
1. Click here to choose which tab should be displayed when you open each statement. For example, do you want the Cashflow Capital Chart to open first or would that spoil the flow for your presentation? You decide!
2. Would you prefer to see zeroes or nothing? Choose in Table Settings.

	Michael £	Jane £	Total £
Earned Income			
Client Widgets Limited (Jane) Salary	0	85,000	85,000
Client Widgets Limited (Michael) Salary	85,000	0	85,000
Sub-total	**85,000**	**85,000**	**170,000**

	Michael £	Jane £	Total £
Earned Income			
Client Widgets Limited (Jane) Salary		85,000	85,000
Client Widgets Limited (Michael) Salary	85,000		85,000
Sub-total	**85,000**	**85,000**	**170,000**



3. Customise your on-screen charts. Change a Pie into a Doughnut, or an Area Chart into a Bar Chart. Change fonts, series colours, backgrounds, borders, legends – just about anything!
4. If you have two charts displayed on a statement, change the orientation between horizontal and vertical to suit your screen.
5. Use the Print Theme Designer in Software Settings to customise how your tables/charts look when printed.