Continuing on the advancements on Discovery’s SmartAdvice tool, the new Financial Needs Analysis (FNA) was built for maximum flexibility and ease of use. It sports a new, intuitive flow that encourages a conversation about the client’s needs and how they can be covered under different circumstances. This allows for a deeper understanding of your clients needs and assists in creating greater certainty in the financial advice process.

- Updated user interface and FNA report
- The new FNA has a redesigned needs analysis dashboard that shows how the advice mandate correlates to specific client needs

**SIMPLIFIED JOURNEY**

- You have the flexibility to quickly capture basic amounts, or an option to capture detailed information
- You are no longer required to follow a prescriptive order of steps and now have the freedom to work in your preferred way
Expenses can be inputted globally, and will populate the entire tool, saving valuable time for you and your client.

The ability to capture more varied client needs means that the FNA can be tailored more precisely to represent the circumstances of different clients, with a simple way to indicate if the information recorded applies to death, disability and/or retirement.

**INPUT OPTIMISATION**

**ENHANCED FUNCTIONALITY**

- Easy-to-understand calculations per need, on a single page.
- Calculations update dynamically as the user inputs information and edits assumptions.
- Tooltips explain key concepts and usage, while easy-to-understand icons guide you through the process.
- Example: Improved, more detailed Estate cost analysis.

New FNA available on SmartAdvice from September 2018.