



O&M Profiler ESP Pricing Plans

Pick you package	Essentials	Standard	Professional
Modules included	1	2	3
Monthly rental	£45.00/mo	£75.00/mo	£120.00/mo
User logins included	1	2	3
Additional user cost	£20.00/mo	£20.00/mo	£20.00/mo

Pick you modules

Switching	Drawdown	Cashflow
Quick, single switch comparisons and consolidation for personal pension, defined benefit pensions , bond, ISA, GIA and wrap to your chosen platform.	Revolutionary drawdown review tool with accompanying MI report and unique three-way comparisons which can include for flexi-access drawdown, UFPLS & annuity.	Easy to use whole of life cashflow and retirement modelling to evaluate your client's current and future financial situation including APTA analysis.

Core system features

- Fund research and analysis
- Morningstar data feed
- Fully customisable dashboards
- Editable reports
- Product sourcing
- AKG With Profits data
- Single page snapshot reports

- Custom products
- Morningstar's risk profiler
- Smart paste
- Quick calculators
- Unique three-way comparisons
- Access to the main DFM providers
- Back-office system integration

- Save your favourite fund or portfolios as a CIP
- Initial training and comprehensive support package