



O&M Profiler ESP Pricing plans

Pick your 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 your 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 income 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.