2020 Freedom Quarter Release Notes

January 2021

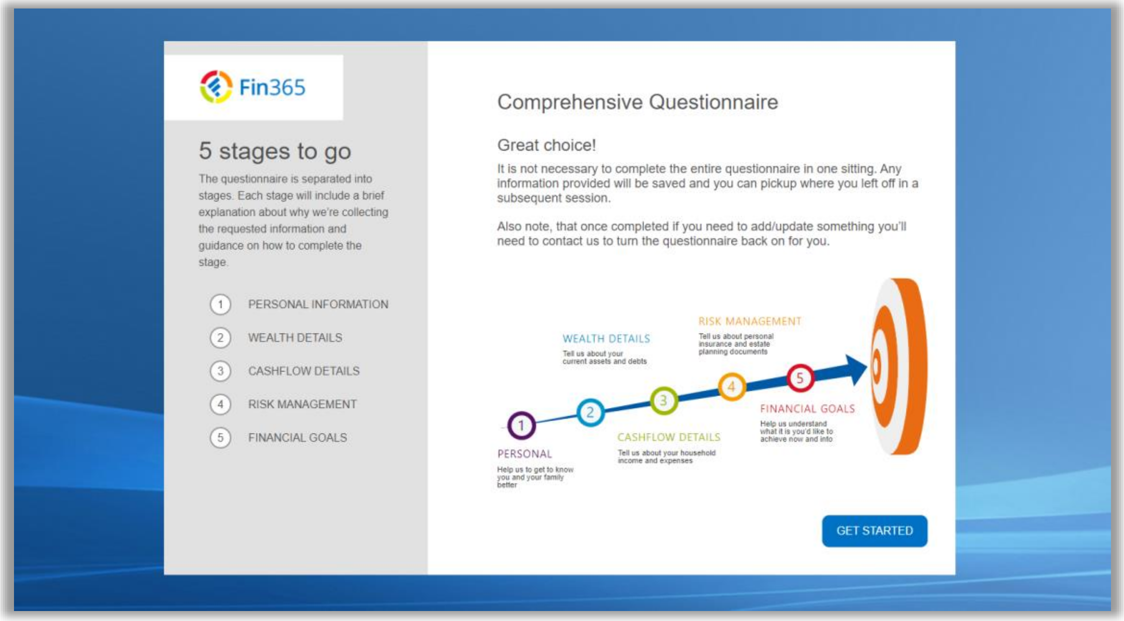
Happy New Year everyone. We're very excited to kick off 2021 with major updates to both our CRM and our Web Portal.

This update is jam packed with new features, so please read through the release notes and reach out to us if you have any questions. The following release notes relate to the web portal. CRM release notes can be downloaded here.

Client Onboarding (Online Fact Find)

Our Client Onboarding has received a major upgrade. As well as redesigning the look and feel, we've added the following:

- Comprehensive and Basic Questionnaire options
- Additional details collected at Household/Contact level
- Collection of Estate Planning information
- The ability to create custom Goals and also to add comments to Goals



Fin365 Client Onboarding feature

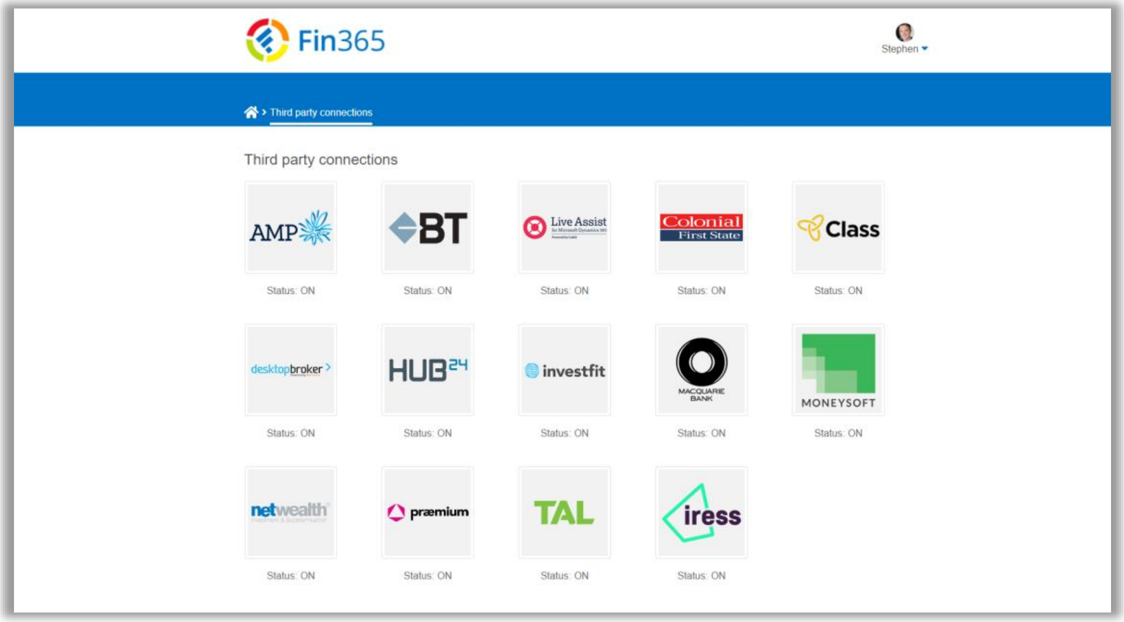
Data feed updates

Data feed connections continue to be one of Fin365's highest priority. The efficiency gains delivered by the automated upkeep of CRM records is immense.

In this release we've added the following:

- Colonial First State First Choice
- AMP
- BT Panorama

The image below shows feeds now supported. Even if you only have a few accounts/policies with these providers, we highly recommend connecting the feeds to automate the upkeep of these records in the CRM.



Fin365 Third Party Connections

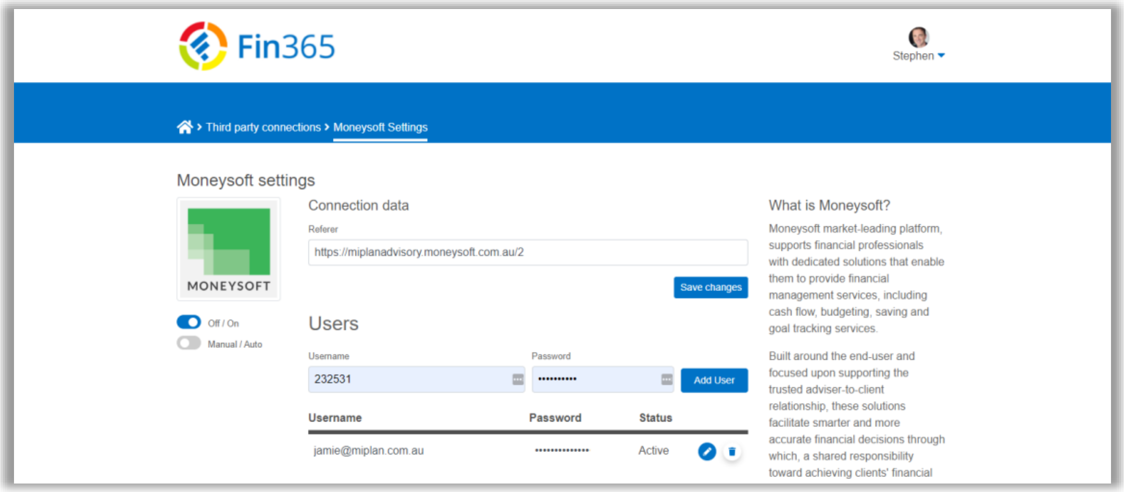
The following data feeds are on the roadmap.

- MLC Wealth Platforms
- Challenger
- Zurich Insurance
- MLC Insurance
- Sharesight

3rd Party Integrations

Moneysoft Licence Distribution + Enhancements

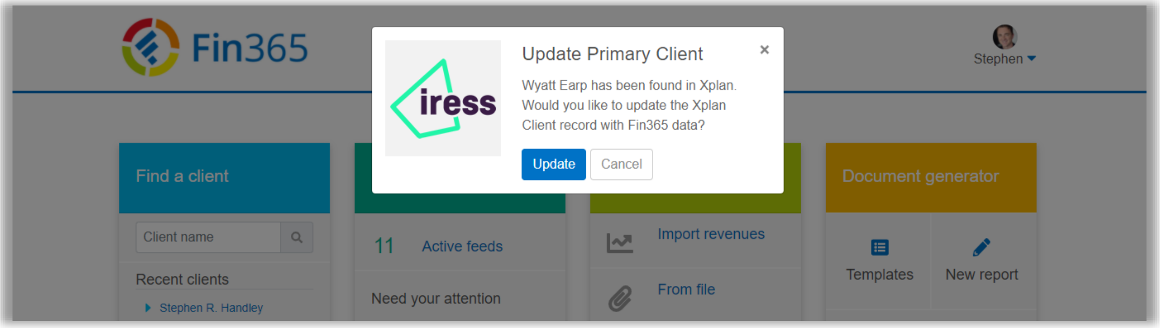
Fin365 recently signed a distribution agreement with Moneysoft. We've also now completed the updates to allow Fin365 customers to sign up for one Moneysoft licence at a time through Fin365's Moneysoft portal and have the data flow to the CRM.



Fin365 Moneysoft Enhancements

Xplan Integration

Version 1.0 of the integration with Xplan is complete. Due to limitations with the Xplan API, this release is limited to uploading basic personal and financial information from Fin365 to Xplan. As Iress rolls out enhancements to the API we'll enable additional scenarios.



Fin365 Xplan Integration

On the Fin365 horizon

As Fin365's customer base has grown, and diversified into different industries/regions, we've received lots of great feedback on ways to improve the value Fin365 delivers and are already back at work on a number of significant enhancements. Here's what's on the horizon ...

Xero

Fin365's integration with Xero will synchronise client data between the two systems. It will enable Fin365 customers to create Invoices directly in the CRM, which will then create a matching invoice in Xero. Upon reconciliation of the Invoice, Fin365 will automatically create a matching revenue record against the Client.

Fintech Integrations

Fin365 is currently working with the following fintech partners on integrations. The bulk of the work, and therefore the timeframe, for these integrations is in the hands of the third party.

Roar (formally YTML) is an Advice Technology marketplace connecting advisers to systems such as Astute Wheel, Omnium, Chant West, etc

Financial Mappers is a cloud based modelling tool that calculates and reveals the numbers you need to see, in order to make your best decisions for future investing, retirement planning, or retirement cash flow management.

Asendium is an automated compliance document generation system for financial planners. Asendium's can increase document generation efficiencies for financial planners and their teams by up to 90%, meaning financial planners can now generate File Notes in under 10 Minutes.

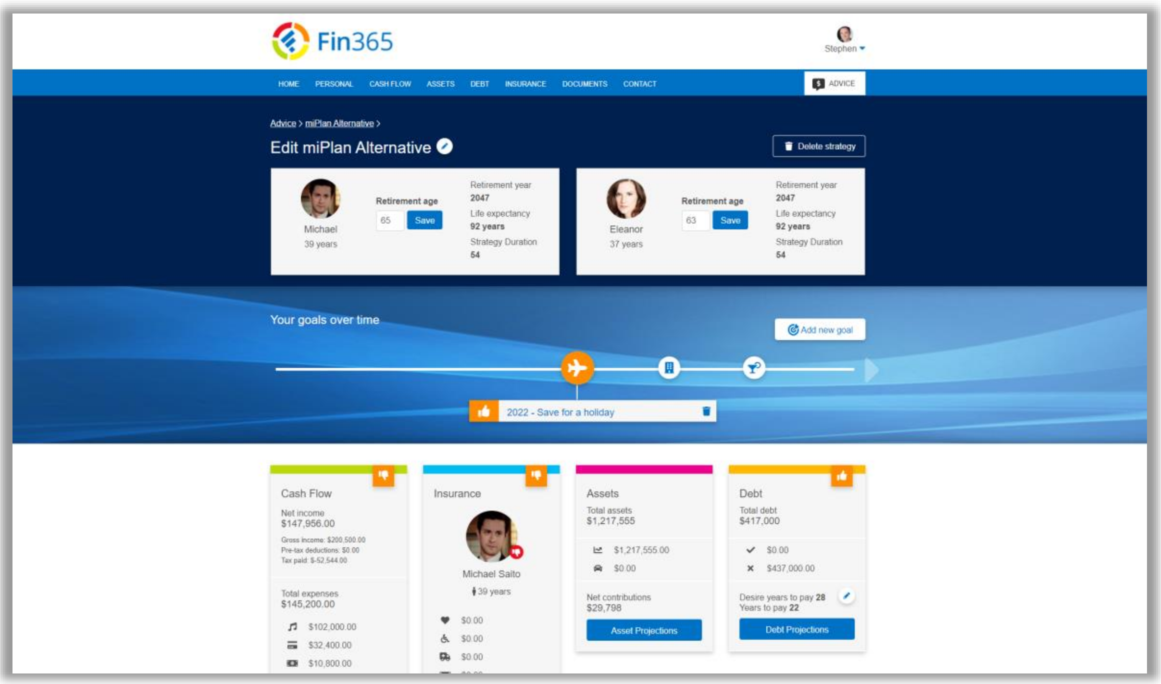
Expanded Document Template Library

In this release, we made some significant improvements to the way data is organised for our document templates. Over the coming weeks we'll be refreshing all of our existing document templates as well as expanding our core template library with additional documents.

Fin365 Document Template Library

Advice Builder Enhancements

Fin365's Advice Builder feature is still in it's infancy. However, with the recent updates to our document template infrastructure and portfolio reporting, we'll now bet back to work at enhancing this part of the system. Our ultimate goal is that advisers will be able to design/discuss simple advice strategies in real time with the client.



Fin365 Advice Builder