Fin365

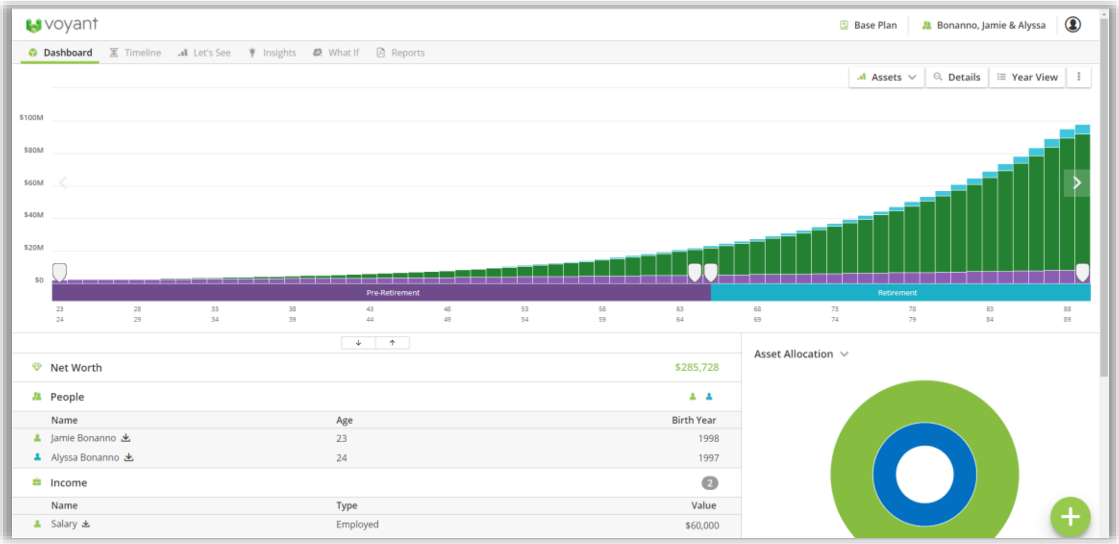
Portal Release Notes

October 2021

Hello, to our growing customer base. We hope everyone is doing well and looking forward to some much-needed R&R during the coming summer season. We're excited to share with you the latest round of updates to both our Web Portal.

Voyant Integration

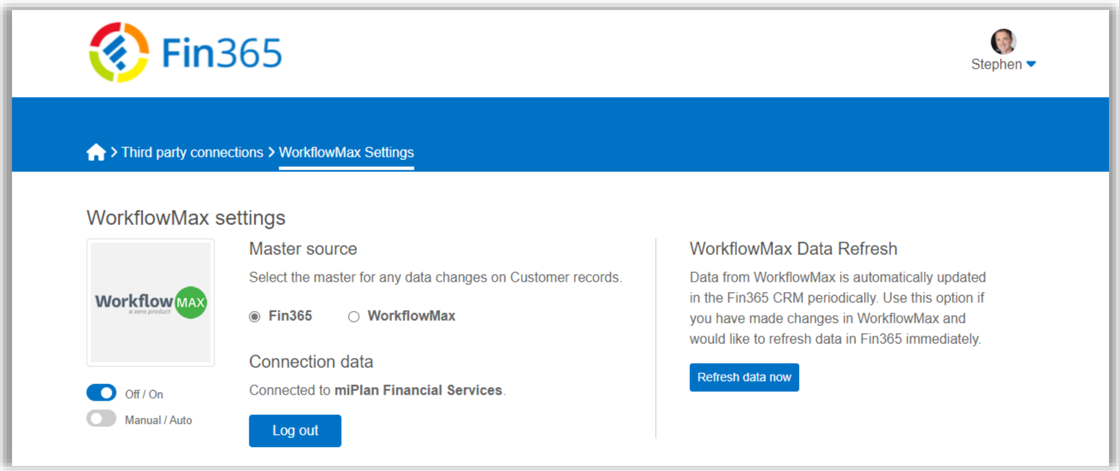
Voyant is a powerful and client friendly financial modelling tool that recently launched in Australia. Client personal and financial data can flow from Fin365 to form the foundation of Voyant's modelling.



Fin365 Voyant Integration

WorkflowMax (Xero Practice Manager) Integration

Following up the Xero Accounting integration we released early this year, we've now also developed a connection to Xero WorkflowMax (and shortly Xero Practice Manager). This integration will enable Jobs & Tasks managed in WorkflowMax to be automatically replicated in Fin365 as Cases/Tasks for the purpose of providing a complete Client "cost of service" picture.

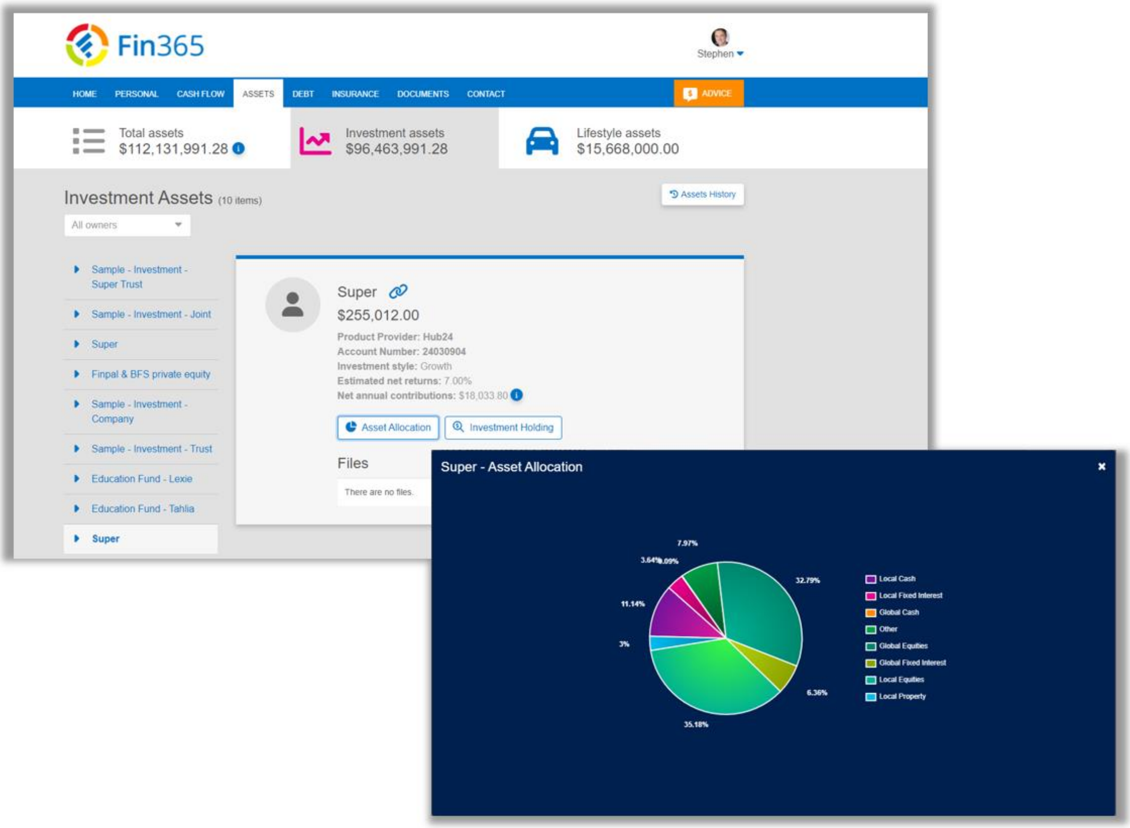


Fin365 WorkflowMax Integration

Client Portal Improvements

The following improvements have been made to the Client Assets section of our Client Portal

- Fee details have been removed
- Portfolio holdings and Asset Allocation views have been added
- Investment Assets and Lifestyle Assets are now viewed using separate Tabs



Fin365 Client Portal

Multi-currency support

Fin365 is now pulling currency/exchange rate data from [Fixer] and feeding it through on a daily basis to currency records in the CRM, which will ensure investments in other geographies automatically display the correct local currency value.

Browser Stability Fixes

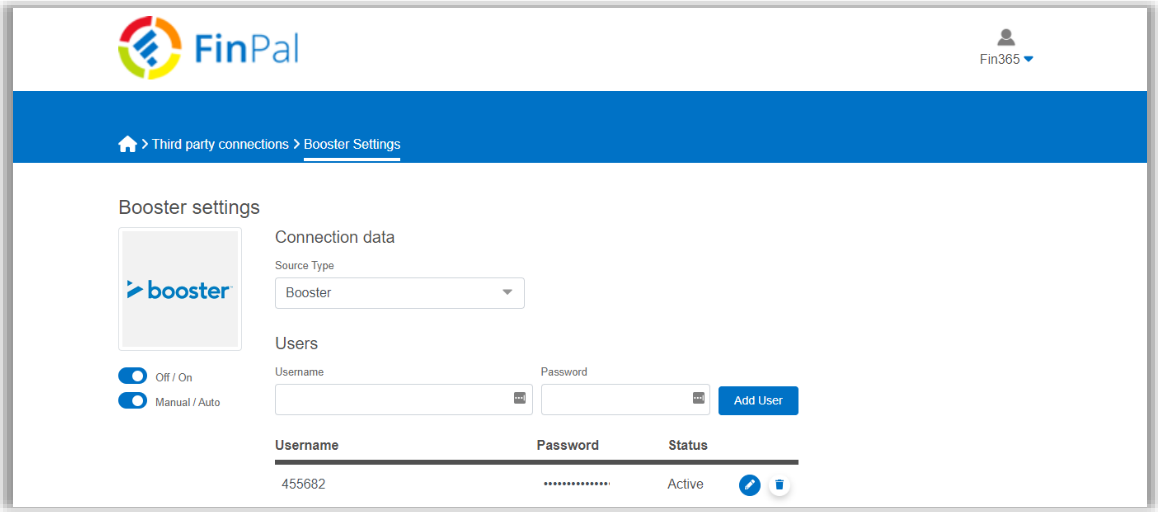
VERY happy to announce that we've finally finished the major updates required for compatibility with Google's recent changes to the way they handle Cookies. No more Chrome Cookie patches required.

We've also added a silent browser refresh feature in our Portal to reduce the likelihood of being logged out at an inconvenient moment (e.g. during the editing of a template)

Data Feed updates

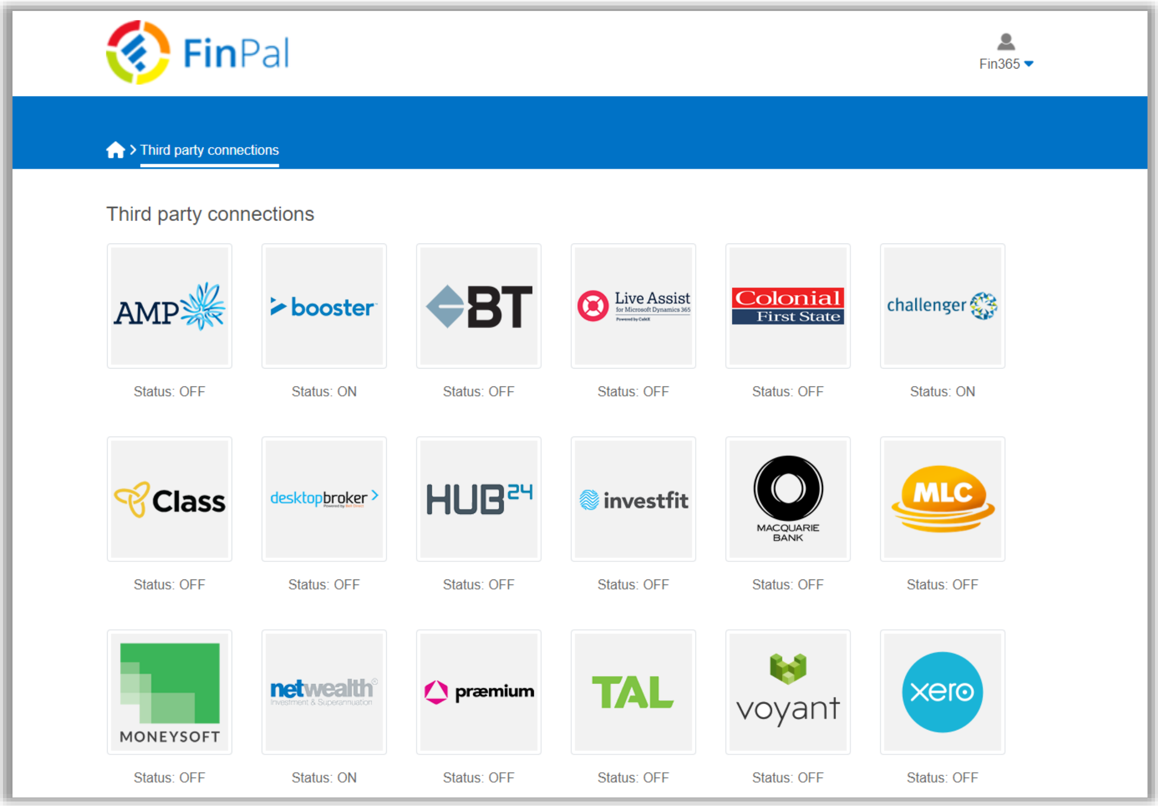
Data Feed connections continue to be one of Fin365's highest priority. The efficiency gains delivered by the automated upkeep of CRM records is immense.

In this release we have added our first New Zealand based connection to the Booster platform. This connection also required an enhancement to our central market data to support multiple regions/currencies.



Fin365 Booster Data Feed

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

Datafeed Roadmap

The following data feeds are on the roadmap.

- Q4 2021
    - Updates to Netwealth and Hub24
    - Consilium/FNZ (New Zealand)
    - Macquarie Online Trading
    - Zurich Insurance
- Q2 2022
    - Asgard/IOOF
    - MLC and AIA Insurance
    - Finclear
    - Sharesight

Timeframes may vary, because in most cases access to data feeds requires involvement from the product providers, most of whom have been significantly impacted by COVID. But we'll keep pushing as hard as we can.

Fin365 CRM Updates

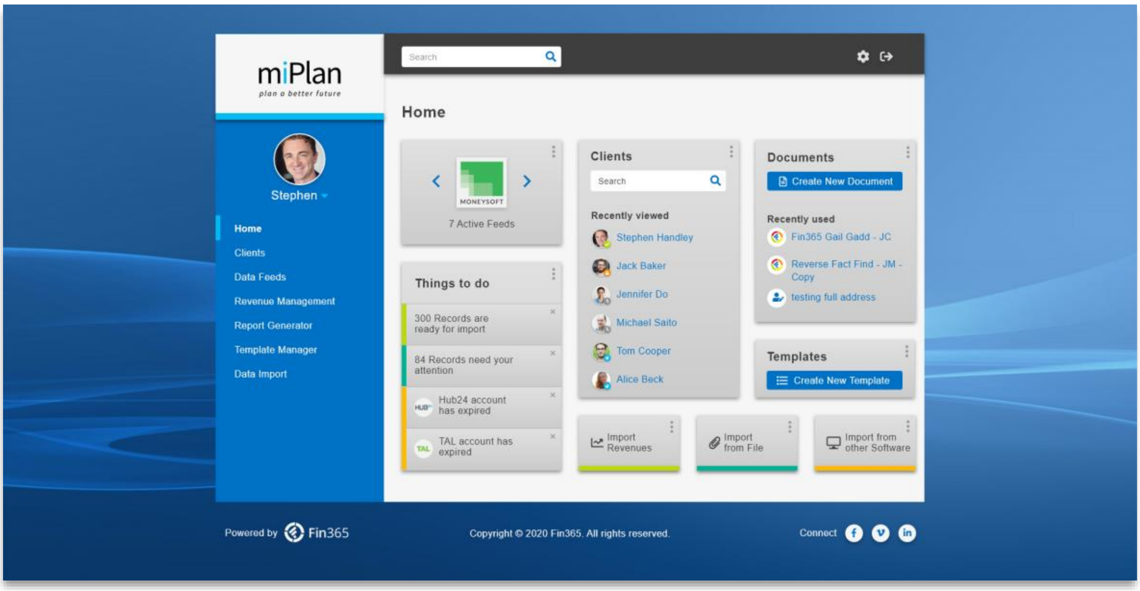
To align with these Poral updates, we've also released some updates to our CRM. Details can be found here

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 ...

Portal design refresh

An increasing number of our customers are starting to access investment instruments in multiple



Fin365 Adviser Portal

Client Portal Enhancements

An increasing number of our customers are starting to access investment instruments in multiple currencies.

Open Banking Integration

We have recently commenced discussions with both Basiq/Akahu (New Zealand) about their "open banking" platforms. Connections to these platforms will enable clients to connect to a broader range of financial accounts (e.g. bank accounts, loans, etc) directly from within our Client Portal and have the information for those accounts update daily in the CRM.

Mobile App

We are currently working on a "proof of concept" App that would allow your clients to install a branded app on their mobile device, which will deliver new possibilities for enhancing your engagement with clients (e.g. direct messages to their mobile phone via the App)

SharePoint Integration

We are currently exploring possibilities for connecting the Client Portal to your internal SharePoint environment to make it much easier to share documents with your Clients.

Portfolio reporting in document templates

An increasing number of our customers are starting to access investment instruments in multiple currencies.

Voyant v2.0 enhancements

In our next round of updates, we'll make it possible for Voyant modelling charts/tables to be automatically inserted in to Fin365 document templates.

ProductRex Integration

ProductRex is a new (free to use) superannuation/investment product comparison platform. Fin365 has been a proud sponsor of ProductRex since its launch and has been working with the ProductRex team on developing integration capabilities between.

Xplan integration enhancements

Iress recently sent us documentation for V2.0 of their Iress Open API. We are reviewing to determine what improvements this update will allow us to make to our integration.