

TechRules Financial Planning

Financial Planning is an essential tool to take charge of our financial future. It implies a process that it is not always easy, which allows an individual to reach a balance between his current quality of life and the one he wishes to achieve in the future.

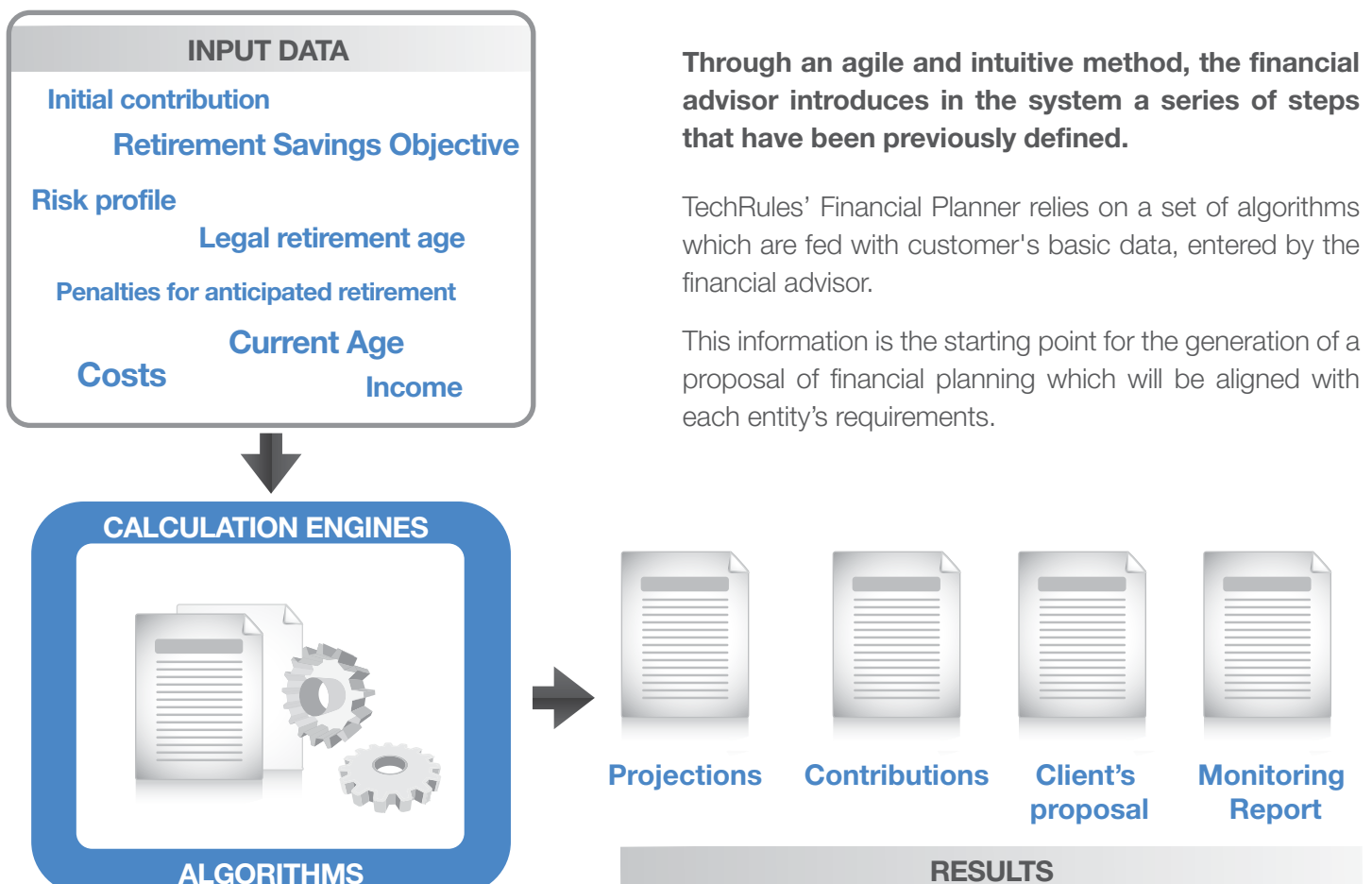
TechRules' Financial Planner is a flexible service that provides financial entities with their own tool to provide clients with an array of different approaches for financial planning, always in accordance with their needs and expectations.

High added value Web Service

TechRules Financial Planning is a web service which is parameterizable, scalable and easy to implement. It comprises a wide range of functionalities that cover the diverse requirements of financial planning.

It grants financial entities with the ability to fulfill their client's need for financial planning, thus promoting the sale of savings, investment and insurance products, throughout a high added value service.

How does it work?



Available and adjustable functionalities

TechRules Financial Planning distinguishes two types of planning:

- 1 Savings and retirement
- 2 Specific financial objective

This module contains several functionalities:

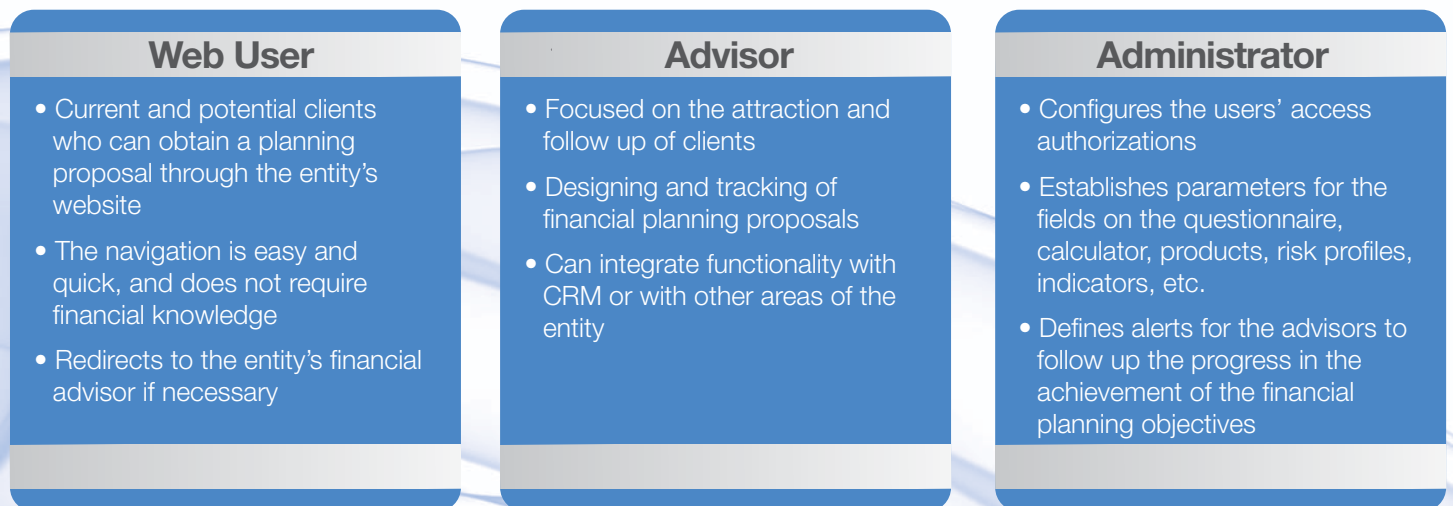
- 1 Planning questionnaire
- 2 Financial calculator
- 3 Report on a planning proposal
- 4 Planning follow up



The financial entity can register and identify the personal financial objectives of its clients, and even the financial objectives of companies. Each client will receive the appropriate financial planning, according to their specific needs.

Creating the required users

The system's administrator may register the necessary users and monitor their activities so that the parameters in use are appropriate to each entity.



Installation and first steps

There are two methods for implementation:

Customer Hosting-> It's possible to Install TechRules' Financial Planning in your entity's server and connect it with other solutions available at TechRules, whether internal or third party.

TechRules Web Service-> Should you wish to avoid an investment on your own server, you may easily use our web service which grants access to all modules and functionalities.

Our customers will be able to reduce all costs derived from infrastructure, downloads, installation, execution, updating and technical resources. TechRules Web Services guarantees safety, efficiency, scalability and adjustment to each entity's business model.