

AdviserLogic Digital Advice Webinar – Q & A's

| Question | Answer |
|---|--|
| All strategy headings are appearing in the SOA output when I only selected Super | This is an error with the current template, our development team will have this fixed very shortly |
| When you select 'Proceeding' to next page, does this save | Yes, once you have proceeded to the next page, those details will be saved against the scenario, you could go out of the Digital Advice tool and resume anytime at the same point. |
| I can add a % fee for initial and ongoing fees | At present, only a \$ fee can be entered. You can manually update this in the output until it is enhanced in a future update |
| This is a fair bit different to the existing Interprac SoA template. I've not gone back to Interprac yet to confirm, but I am assuming they are happy for the SoA to go out in this very format you are showing today? Do you know if that is the case? | Yes, the Digital Advice template does look quite different to the previous SOA, however this has been reviewed and signed off by InterPrac. |
| Can the information from Cashflow modelling tool be included in the SOA? | At present, the Cashflow projections and charts are not integrated with the Digital Advice tool. You will need to cut and paste these into the SOA output. |
| Does the SOA come out in word format? | We are exploring this option, further information will be provided shortly. |
| Has the template been signed off by InterPrac as compliant? | Yes InterPrac compliance has signed this template off |
| Can you add in your own electronic letterhead? | Modifications like this can be made through the consulting team. There is a cost and timeframe involved. You can contact our support team for these requests. |
| With page breaks are we able to see these? | A page break is indicated by a grey line at the bottom of the page, as per examples below. You can also add a page break to any page. |

For recommended strategy or proposed solutions, please do not hesitate to contact us on:

Yours sincerely,

Adviser Name
Demo AFSL
AFSL No. 123456



Superannuation Recommendation

This section contains our recommendations for your superannuation funds and its underlying assets.

Where can I find the Digital Advice FAQ's and articles

There is an extensive list of frequently asked questions in Zendesk, we also publish articles on recent topics.

You can access those articles here
<https://adviserlogic.zendesk.com/hc/en-us/articles/360001473856-Digital-Advice-Frequently-Asked-Questions>