

defaqto

Five reasons why you will want to upgrade to...

Engage C[○]RE



Five benefits of Engage Core

Engage Core is Engage with new features that we think you will like, such as seamless integration with back office systems and the ability to include adviser-led model portfolios.



Eliminate the need to re-key details, making the process faster and more efficient

- Join your advice process together thanks to seamless integration with back office systems such as Intelliflo and IRESS, whether it is clients' details or their existing portfolios.



Store client information, financial plans and fund holdings in Engage for as long as you hold the licence

- Undertake client reviews and valuations against their agreed objectives.
- See all the history with your client on a chronological timeline, helping you to get an overview at a glance.
- Access to whole of market, product, platform, DFM and fund research.
- MiFID II data is included for funds.



Create, store and manage clients, goals and research, all in one place

- Create growth, income or protection goals for your clients, with each goal being able to have a different risk level.
- Create multiple versions of research for each goal so you can propose more than one option to your client for discussion.



Choose the portfolio construction method that suits your client segments including your CIP

- Choose from five portfolio construction methods including: adviser-led model portfolios, risk rated multi-asset funds, risk rated DFM managed portfolios, risk optimised single-asset or manual selection from the whole of market.
- Create, store and manage adviser-led model portfolios.
- Programme and distribute panels with the option to use the pre-configured Defaqto fund panel.



Control access and usage across your firm

- While adviser users can only access their clients' data to perform research and analysis, the firm principal user can distribute clients and their data across all advisers.
- Paraplanner users can access all clients' data and thus support all advisers with research.

Engage Core features overview

	Engage	Engage Core	Engage Core Plus
Client management			
Back office integration		•	•
Clients' details, including goals and ATR maintenance		•	•
Client management on firm and user level		•	•
Paraplanner support for several advisers		•	•
Automatically created audit trail		•	•
Consolidate existing products		•	•
Add legacy products	•	•	•
A2Risk ATR questionnaire	•	•	•
Oxford Risk and Finametrica ATR questionnaires		•	•
Decumulation Income Risk Profiling	•	•	•
Goals and objectives			
Goal based research		•	•
Past research review		•	•
Financial goal tracking		•	•
Existing holdings review		•	•
Fund research for accumulation and decumulation			
Accumulation Defaqto risk rated funds and DFM models	•	•	•
Adviser-led model portfolios			•
Defaqto risk optimised target asset allocation	•	•	•
Retirement modeller			•
Decumulation workflow	•	•	•
Decumulation Defaqto risk rated funds	•	•	•
MiFID II data for funds	•	•	•
Product research			
Three-way product, platform and fund research	•	•	•
Create panels and templates	•	•	•
Ad-hoc research across Defaqto product and fund database			•
Support			
Training	•	•	•
Support	•	•	•
Toolkit	•	•	•
Defaqto Risk Rating documentation	•	•	•

Want to know more about how Engage Core can help you deliver client-centric, compliant advice?

Get in touch to request a demo:



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