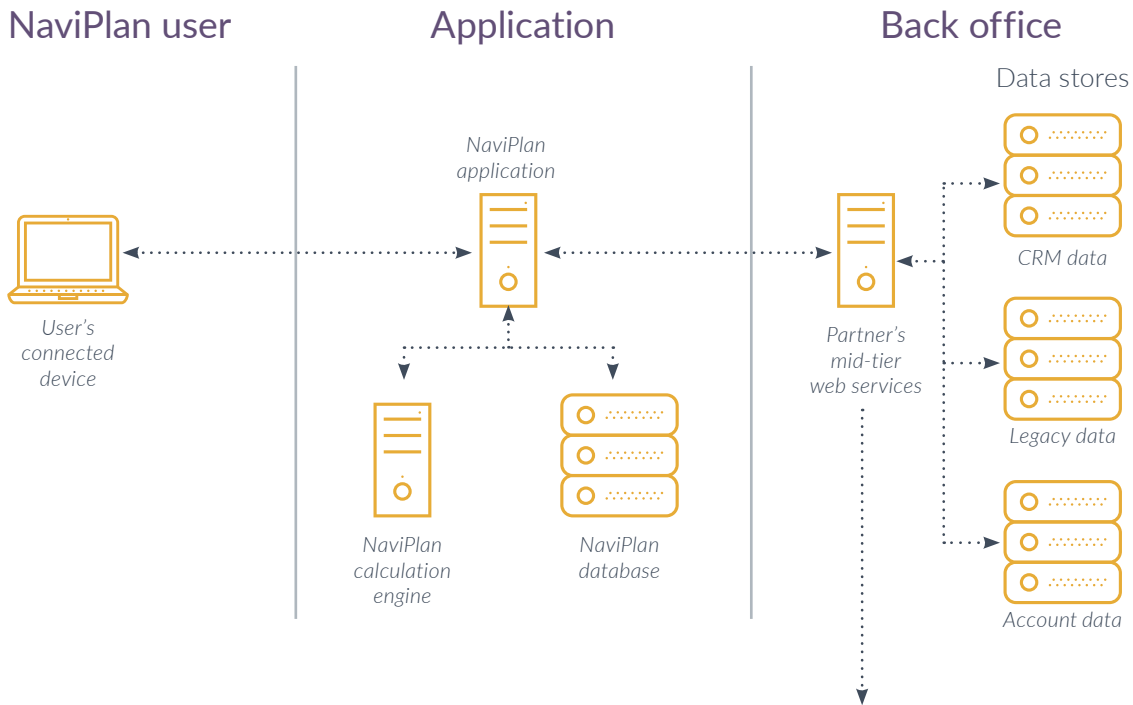


# NaviPlan<sup>®</sup> web service integration

## Overview

NaviPlan offers real-time updates to financial planning data using web services. The diagram below details the setup and flow of data between NaviPlan and your back-office system. This is the integration solution that the vast majority of our customers utilize as it offers real-time data updates and can be designed to support any level of data integration desired.

The web service integration also allows for future flexibility in importing data into NaviPlan. The web services are consistently enhanced with each release of NaviPlan to offer additional functionality without impacting existing services that are already in use.



## Adding value for enterprises

Advicent leverages decades of experience with enterprise implementations to enable large enterprise firms to deliver financial planning that aligns with unique business and operating models. This is accomplished through robust web services that enable automation of back-office tasks like user provisioning, as well as implementation of custom workflows between back-office systems that manage both customer and account information for the enterprise.

By utilizing data from these existing sources, advisor productivity is increased by reducing data entry required for planning processes and keeps information as up to date as possible. Additionally, this supports compliance requirements around consistency as data can be maintained centrally and updated on a regular basis through these robust integrations.

The configurability and flexibility of our integration frameworks enable large financial services institutions to reliably deliver best-in-class financial planning tools to their advisors, while protecting and leveraging their previous investments in other large scale solutions, including: account aggregation, CRM solutions, and core accounting systems.

## A guide to our implementation process

When engaging in an implementation project that includes back-office data integration, Advicent is committed to supporting the effort through the phases outlined below. The various activities identified continually result in timely, successful projects that allow our customers to realize the value of NaviPlan and the efficiencies enabled by data integration.

During the implementation, our experts will provide support through the following phases:

### Initiation

- Assist with building out high-level data flow and identify web service calls to be utilized
- Assist with developing use cases for different users, activities within NaviPlan, and data required
- Review web service documentation in detail
- Understanding your company's minimum technical and security requirements

### Establishing requirements

- Based on the high-level data flow established during initiation, map each data point between your company's back-office systems and NaviPlan
- Technical sessions for questions around the implementation work being performed by your company's team

### Implementation & configuration

- Set up integration channels for all environments, including: Systems Integration Testing (SIT), User Acceptance Testing (UAT), Disaster Recovery (DR), Production (PROD)
- Establish security for all environments, including certificate exchanges and IP whitelisting
- Establish communication between systems and provide support for troubleshooting
- Determine web service configurations within NaviPlan
- Establish weekly technical meetings to review progress and answer questions

### Execution

- Complete environment mapping documentation with all endpoints/certificates for maintenance going forward