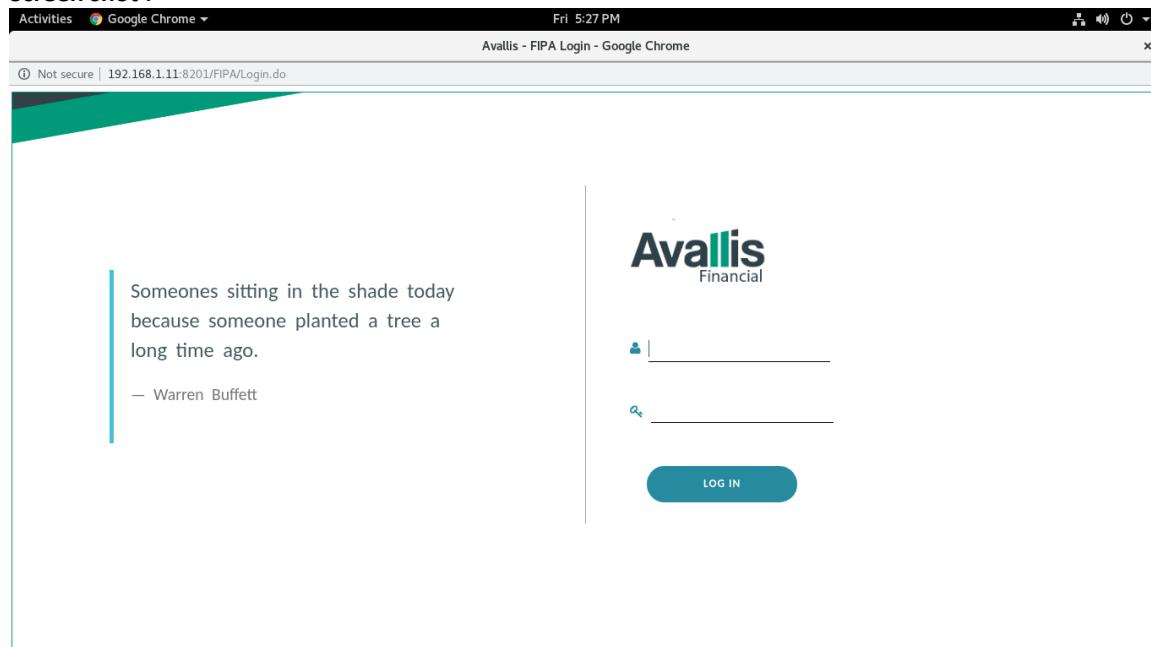


FINANCIAL PLANNING APPLICATION

Document Number	FIPA - Manual	Version Number	1.0	Control Stamp	
Prepared by		Designation		Signature	Date of Review
R.Thulasy		Developer			
Approved by		Designation		Signature	Date of Approval
Owner	TASPro Solutions	IT	Release Date	Copy Number	1
Distribution List	IT Team				

Screen Name : Login Screen**Description:**

1. Login as FPMS users.
2. Screen provided with user name and password credentials.
3. After providing credential details , it validates whether given user name and password is correct.
4. Then click Login button , the screen redirects to Home Screen.

Screen shot :

Screen Name : Search Screen

Description:

1. Search Screen is to Search by Client Name and NRIC/FIN number of particular client.
2. Then the search results will be provided with some client information like client name, Email , Contacts ,an icon Indication is given whether client info is from FPMS,FIPA,both etc.
3. Suppose the Client is a FPMS User , it provides a tick symbol under FPMS icon which indicates that existing information is from FPMS, no need to re-key client particulars.
4. Data will be fetch from FPMS to FIPA.
5. Suppose the Client is a FIPA User, it provides a tick symbol under FIPA icon which indicates that no information will be found in FPMS.
6. If the tick symbol arise under Both icon(FPMS & FIPA icon) , it indicates Client information exists in both Systems (Client has existing portfolio and performed FNA before)
7. On Selecting the particular client information, the Profile Screen will be opened listing all profile information of that client which has already updated before.
8. If No profiles Created before it redirects to Types of Application screen.

Screen shot :

The screenshot shows the FIPA application interface. At the top, there's a navigation bar with 'Activities', a dropdown for 'Google Chrome', the date 'Fri 5:27 PM', and system icons. Below the bar, a message 'Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=175D1916E650B3F0F9B8A5417646D66B' is displayed. The main area has a teal sidebar on the left labeled 'Profile Search'. The central part is titled 'Search Client By' and contains fields for 'Name' (set to '%SALIM%') and 'NRIC/ FIN No.'. A 'Search' button is next to the name field. Below these, a table titled 'Search Results' shows 6 entries for clients matching the search term. The columns are: #, Select (radio button), Client Name, NRIC, Email, Contacts, FIPA (with a green checkmark), FPMS (with a blue checkmark), and Both (with a green and blue checkmark). The entries are:

#	Select	Client Name	NRIC	Email	Contacts	FIPA	FPMS	Both
1	<input type="radio"/>	Aaron Salim	S9934827E		68846606			<input checked="" type="checkbox"/>
2	<input type="radio"/>	Ariel Salim	S9409428C		68846606			<input checked="" type="checkbox"/>
3	<input type="radio"/>	Danielle Salim	S9206901Z	hotcries@hotmail.com	92277808			<input checked="" type="checkbox"/>
4	<input type="radio"/>	Mohamed Salim Bin Mohd Amin	S154B996J	salim@firstprincipal.com	98474500			<input checked="" type="checkbox"/>
5	<input type="radio"/>	Muhammad Suhail Bin Salim	S8706190F		64449660			<input checked="" type="checkbox"/>

At the bottom, a footer bar states 'Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3'.

Screen Name : Profile Summary Screen

Description:

1. This Screen provides client's profile summary information , if the selected Client has profiles already updated will be listed as Profile Summary.
2. Only the latest profile can be selected and updated if needed. Old profiles of the client can be selected but cannot be updated.
3. On Selecting the latest profile ,it directly redirects to Types of Application screen by fetching all its profile information and populated on the screen.
4. If selected any older profiles , it will show alert that "The Selected Profile is not latest! Cannot edit this profile".Upon click OK Button it redirects to Types of application screen but profile cannot be edited on any screens only view is available.If Cancel it retains on same profile summary screen.

Screen shot :

#	Select	Date Created (DD/MM/YYYY HH:MM:SS)	Analysis	Application Types	Applicant	Remarks	Status	Approval
1	<input type="radio"/>	03/05/2019 04:05:31 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing.Life	-	-
2	<input checked="" type="radio"/>	03/05/2019 04:05:37 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing.Life insurance premium amount	-	-
3	<input type="radio"/>	03/05/2019 04:05:45 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing.Life	-	-
4	<input type="radio"/>	29/04/2019 05:04:57 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing	-	-
5	<input type="radio"/>	24/04/2019 02:04:38 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing	-	-

#	Select	Date Created (DD/MM/YYYY HH:MM:SS)	Analysis	Application Types	Applicant	Remarks	Status	Approval
1	<input type="radio"/>	03/05/2019 04:05:31 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing.Life	-	-
2	<input checked="" type="radio"/>	03/05/2019 04:05:37 PM	The Selected Profile is not latest! Cannot edit this profile.	<input type="button" value="OK"/> <input type="button" value="Cancel"/>	Self Spouse Family	Retirement planning pdf testing.Life	-	-
3	<input type="radio"/>	03/05/2019 04:05:45 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing.Life	-	-
4	<input type="radio"/>	29/04/2019 05:04:57 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing	-	-
5	<input type="radio"/>	24/04/2019 02:04:38 PM	...Education Analysis	FULLFACT	Self Spouse Family	Retirement planning pdf testing	-	-

Screen Name : Types of Application Screen
Description:

1. This Screen Contains Analysis for,Purpose,Application Type(Client's choice) and Analysis Types information.
2. Based on “ANALYSIS FOR” checkbox selection , that particular information only allowed to update. If Analysis for selection is “Client” - All client related sections/fields only allowed to be updated, If Analysis for selection is “Spouse” - All Spouse sections/fields only allowed to be updated. Similarly If Analysis for selection is Family - All Family sections/fields only allowed to be updated.
3. If you unchecked the Analysis for selection , it prompt you whether you need to clear all updated selection details.
4. If you unchecked Analysis for as “Family” , it prompt you that "Do you want to clear All Family Details".If Upon click Proceed all Family Section/Fields data will be cleared and cant be updated.

Screen shot :

Profile Search

Profile

Types of Application (Selected)

Particulars

Financial Goals

Financial Info

Analysis Report

Attachments

Summary

Declaration

Supervisor's Review

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Is this application intended to replace in part or in full any existing designated investment/ A&H product? Yes No

	Simplified	Fact Find
Life & Non-Insurance Products	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Accident and Health (A&H) Products	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Analysis Type *

Select All CPF Projections Analysis
 Cash Flow Analysis Survival Needs Analysis [Self]
 Education Analysis Life Insurance Portfolio Report
 Net Worth Analysis Summary of Investment Holdings
 Protection Need Analysis Survival Needs Analysis [Spouse]

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Profile Search

Profile

Types of Application (Selected)

Particulars

Financial Goals

Financial Info

Analysis Report

Attachments

Summary

Declaration

Supervisor's Review

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Is this application intended to replace in part or in full any existing designated investment/ A&H product?

FIPA - Message

Do you want to clear All Family Details?

Analysis Type *

Select All CPF Projections Analysis
 Cash Flow Analysis Survival Needs Analysis [Self]
 Education Analysis Life Insurance Portfolio Report
 Net Worth Analysis Summary of Investment Holdings
 Protection Need Analysis Survival Needs Analysis [Spouse]

Proceed **Cancel**

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Screen Name : Particulars - Client Particulars.
Description:

1. This Screen contains all client information .
2. If Existing client search is an FPMS user , then all details are fetch from FPMS to this Screen. Or Else FIPA user details will be shown.
3. Fields denoted in * or labels indicate in maroon color will specify that it is Mandatory fields which needs to be keyed in.
4. On Selecting Servicing Adviser Name , theirs Manager Name will be automatically selected.
5. Date of Birth is validated to standard format and automates its Age accordingly.
6. Email Address validates to its standard format.
7. By default Mailing Address Section will be disabled since all Registered Residential address will be reflected .If you need a different address to be keyed in then select Different from registered residential address check box, then key in your Mailing Address fields which is different from your registered residential address.

Screen shot :

The screenshot shows the FIPA Client's Particulars screen. The left sidebar has 'Client's Particulars' selected. The main area shows 'Client Information' with fields like Name (As per NRIC), Servicing Adviser, Manager, Date of Birth, Age, Nationality, NRIC, Gender, Martial Status, Source of Fund, and Smoking. To the right is the 'Residential Address' section with fields for Address1, Address2, Postal Code, and Country (set to NEW ZEALAND). A note at the bottom says 'Different from registered residential address' with a checkbox.

8. While keying in some data will be reflected to other screen for calculation purpose , it will be indicated by Toast Message.

The screenshot shows the FIPA Client's Particulars screen with a toast message in the top right corner: 'FIPA Notifications - This action will reflect - Month Net Income(Self) in Expected Fund Inflow / Outflow Screen !'. The left sidebar has 'Client's Particulars' selected. The main area shows 'Contact Information' and 'Employment Info' sections. A note in 'Employment Info' says 'Reason for different Mailing Address'.

Screen Name : Particulars - Spouse Particulars.

Description:

1. This Screen contains all spouse information .
2. Fields denoted in * or labels indicate in maroon color will specify that it is Mandatory fields which needs to be keyed in.
3. Date of Birth is validated to standard format and automates its Age accordingly.
4. Email Address validates to its standard format.
9. By default Mailing Address Section will be disabled since all Registered Residential address will be reflected .If you need a different address to be keyed in then select Different from registered residential address check box, then key in your Mailing Address fields which is different from your registered residential address.
5. Under Register Residential Address Section , On selecting Same as Client's Registered Residential Address, the details from client particular screen its Registered Residential Address will automatically copies data from into Spouse Particulars Registered Residential Address.
6. Similarly Under Mailing Address Section ,On selecting Same as Client's Registered Residential Address, the details from client particular screen its Registered Residential Address will automatically copies data from into Spouse Particulars Registered Residential Address.

Screen shot :

The screenshot displays the FIPA (Financial Planning Application) interface. The top bar shows 'Activities Google Chrome' and the current time 'Fri 5:53 PM'. The title bar reads 'Avallis | FIPA - Google Chrome'. Below the title bar, a message indicates 'Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=175D1916E650B3F0F9B8A5417646D66B'. The main content area is titled 'Spouse's Particulars' and includes a note: '(Fields denoted in * requires documentation for successful updates) Last updated on 14/06/2019'. The left sidebar has a 'Particulars' section with 'Client's Particulars' selected. The right side shows two address sections: 'Residential Address' (with a checked checkbox for 'Same as Client's Registered Residential Address') and 'Mailing Address' (with an unchecked checkbox for 'Different from registered residential address'). Both sections include fields for Address1, Address2, Postal Code, and Country (set to NEW ZEALAND). At the bottom, there is a footer note: 'Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3'.

Screen Name : Particulars - Children's Particulars

Description:

1. This Screen contains Children information of the client.
2. On Adding multiple rows we can fill information of all children's of a client.
3. Upon click Add button , it shows a pop-up screen to enter all necessary details.
4. Only Son and Daughter relationship can be add in children's details.
5. Name of Child , DOB and Relationship are the mandatory fields which is denoted in **maroon** text colour.
6. Based on Age and Relationship selected , respective calculation for Years to Tertiary will be displayed automatically.
7. We can able to Edit the updated record , on Selecting the select check box and click Edit button and update the details .
8. We can able to Delete the record , on Selecting the select check box and Click Delete button to delete the row and save record to delete this record detail.

Screen shot :

Activities Google Chrome ▾ Sat 10:40 AM Avallis | FIPA - Google Chrome ▾

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

- Client's Particulars
- Spouse's Particulars
- Children's Particulars**

Financial Goals

Financial Info

Analysis Report

Attachments

Summary

Declaration

Supervisor's Review

Particulars Children's Particulars

Showing 1 to 3 of 3 entries

#	Name of Child*	DOB (DD/MM/YYYY)*	Age (yrs)	Relationship*	Gender	Yrs to Tertiary (yrs)	Est. Annl. Cost of Tertiary Edn. (\$)	Yrs in Tertiary Educatic (yrs)
1	child3	15/04/2015	4	Son ▾	Male ▾	17	1200	304
2	Child1	11/01/2000	19	Son ▾	Male ▾	2	50	60
3	child2-u	14/05/2001	18	Daughte ▾	Female ▾	0	1512	12

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Activities Google Chrome ▾ Sat 10:39 AM Avallis | FIPA - Google Chrome ▾

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

- Client's Particulars
- Spouse's Particulars
- Children's Particulars**

Financial Goals

Financial Info

Analysis Report

Attachments

Summary

Declaration

Supervisor's Review

Particulars Children's Particulars

Children's Particulars

Name of Child*	Est. Annual Cost of Tertiary Edn.
Date of Birth (DD/MM/YYYY)*	Years in Tertiary Edn.
Age yrs	Available Education Funds Provided
Relationship*	Remarks
Gender	
Years to Tertiary yrs	

Add Close

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Screen Name : Financial Goals

Sub Section I: Financial Goals/ Concerns

Description:

1. This Screen contains Types of financial goals, financial goal concern and Priority information of the client.
2. On Adding multiple rows we can fill information of all children's of a client.
3. Upon click Add button , it shows a pop-up screen to enter all necessary details.
4. We can Add,Edit,Delete Records by select the specific field select check box.

#	Type of Financial Goals*	Financial Goals/Concerns*	Priority
1	--SELECT--		Medium
2	--SELECT--		Low
3	--SELECT--		Low

#	Type of Financial Goals*	Financial Goals/Concerns*	Priority
1	Assetting Hardware	TEST115800	Medium
2	TEST ASSET 2019	7825	Low
3	TEST ASSET 2019	7800	Low

5. If need to add **"On Spot Master Entries"** for Types of Financial Goals (to add multiple options) . Upon on clicking the icon near select box.An pop-up open to add or delete new types of financial goals.

Activities Google Chrome ▾ Sat 10:48 AM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars **Financial Goals** Financial Info Analysis Report Attachments Summary Declaration Supervisor's Review

Financial Goals

Financial Goals/ Concerns

On Spot Master Entries

New Value* Remarks

Types Of Financial Goals

FIPA -Notification Cardware Click to add new value 2019 TEST

Dependencies

Showing 1 to 6 of 6 entries

Close

Wealth Accumulation Goals

Showing 1 to 3 of 3 entries

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- Key in mandatory fields which is indicated in maroon text. To add multiple options of Types of Financial Goals. You can even delete a particular option on selecting a row from table and click delete button.

Sub Section II : Wealth Accumulation Goals

- Wealth Accumulation Goals contains information of Purpose , When(No. of years), Amount Needed ,Priority and Risk level.
- Upon click Add button , pop-up appears with all necessary information , Key-in mandatory fields which is denoted by maroon text.
- Can be able to Add row ,Edit , Delete and View Records on selecting select check box.

Screen shot :

Activities Google Chrome ▾ Sat 10:55 AM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars **Financial Goals** Financial Info Analysis Report Attachments Summary Declaration Supervisor's Review

Financial Goals

Wealth Accumulation Goals

Purpose*

When(No.of Years)* yrs

Amount \$

Priority

Risk Level

Showing 1 to 3 of 3 entries

1 2 3

Close

Priority Risk Level

Medium Medium
Low Medium
Low Low

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Activities Google Chrome ▾ Sat 10:57 AM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Financial Goals

3	<input type="checkbox"/>	TEST ASSET 2019	7800	Low
---	--------------------------	-----------------	------	-----

Wealth Accumulation Goals

Showing 1 to 3 of 3 entries

#	<input type="checkbox"/>	Purpose*	When (No.of Years)*	Amount Needed(s)*	Priority	Risk Level
1	<input type="checkbox"/>	TEST1250	12	13	Medium	Medium
2	<input type="checkbox"/>	TEST140080911	12	13400	Low	Medium
3	<input type="checkbox"/>	4802	12	33	Low	Low

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Screen Name : Financial Info
Sub Item : Dependant Needs

Description:

1. This Screen Contains information other than the Family Member , key in the details.
2. Included Mandatory fields Dependents Name, Age and Relationship that is to be filled.
3. By Providing Monthly amount by self and Monthly amount by spouse, the monthly contribution is calculated .
4. Total of All Dependents Monthly Contribution , Monthly Amount by Self and Monthly Amount by Spouse is also Calculated.

Screen shot :

Activities Google Chrome ▾ Sat 11:02 AM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Financial Info > **Dependant Needs**

Dependant Particulars

Dependant Name*

Relationship*

Date of Birth (DD/MM/YYYY)*

Age yrs

Gender

Years to Support yrs

Monthly Contribution

By Self

By Spouse

Total Contribution

Add Close

Total Monthly Contribution(\$): 1947 125 20

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Activities Google Chrome ▾ Sat 11:02 AM Avallis | FIPA - Google Chrome x

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

- Dependant Needs**
- Expected Funds Inflow and Outflow
- Contingency Planning
- Retirement Planning
- Life Insurance
- Investments
- Properties
- Cash Assets

Financial Info Dependant Needs

Showing 1 to 3 of 3 entries

	Dependant Name*	Relationship*	DOB (DD/MM/YYYY)*	Age (yrs)	Gender	Years to Support (yrs)	Monthly Amount(\$)			Total Contrib.
							By Self (\$)	By Spouse (\$)		
<input type="checkbox"/>	TEST2	ACQUAINTA	15/04/2001	18	Female	12	13	88		
<input type="checkbox"/>	TEST37800	ACQUAINTA	12/09/2009	9	Male	1	1922	14		
<input type="checkbox"/>	TEST	ACQUAINTA	11/02/2000	19	Female	10	12	23		

Total Monthly Contribution(\$): 1947 125 20

Total Annual Contribution(\$): 23364 1500

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Screen Name : Financial Info

Sub Item : Expected Funds Inflow and Outflow

Description:

Section I : Employment Income

1. This Contains Employment Income details such as Monthly Income(OW), Increment, Period, Bonus(AW) for Self , Spouse and Joint/Family.

Screen shot :

Activities Google Chrome ▾ Sat 11:05 AM Avallis | FIPA - Google Chrome x

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

- Dependant Needs**
- Expected Funds Inflow and Outflow**
- Contingency Planning
- Retirement Planning
- Life Insurance
- Investments
- Properties
- Cash Assets

Financial Info Expected Funds Inflow and Outflow

	SELF	SPOUSE	JOINT/FAMILY
Employment Income			
Monthly Net Income(OW)	\$ 11	\$ 122	\$ 222
Increment	40 %	12 %	60 %
Period	70 yrs	23 yrs	72 yrs
Bonus(AW)	\$ 73	\$ 14	
Non-employment Income			
Monthly Income	\$ 75	\$ 22	\$ 77
Annual Rental Income	\$ 80	\$ 99	\$ 5
Investment Income,dividends, gains	\$ 44	\$	\$
Other Income	\$ 84	\$ 80	\$ 86

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Section I : Non-Employment Income

2. This Contains Non-Employment details such as Monthly Income, Annual Rental income ,Investment income dividends gains,other income,Annual Savings ability and Annual Increment for Self, Spouse and Joint/Family with Remarks field.

3. By Key-in in all these above details will generate its total calculation in Total Annual Inflow .

Screen shot :

The screenshot shows the FIPA software interface. The top bar displays 'Activities Google Chrome' and the date 'Sat 11:09 AM'. The title bar says 'Avallis | FIPA - Google Chrome'. A message 'Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00FCBC664518F68846A3D611C9BB7875' is shown. The main content area has a header 'Financial Info' and 'Expected Funds Inflow and Outflow'. On the left is a sidebar with categories like Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info (selected), Dependant Needs, Expected Funds Inflow and Outflow (selected), Contingency Planning, Retirement Planning, Life Insurance, Investments, Properties, and Cash Assets. The main panel shows tables for 'Non-employment Income' and 'Annual Increment' across three categories: SELF, SPOUSE, and JOINT/FAMILY. The 'Non-employment Income' table includes rows for Bonus(AW), Monthly Income, Annual Rental Income, Investment Income, dividends, gains, Other Income, Total Annual Inflow, Annual Savings Ability, and Annual Increment. The 'Annual Increment' table shows percentages for SELF, SPOUSE, and JOINT/FAMILY. At the bottom, there is a 'Remarks' section and a footer note: 'Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3'.

Section III : Annual Expenditure - Outflow

4. This Contains Annual expenditure details for Self, Spouse and Joint/Family.Such as Rental for Lodgings ,Utilities & communication ,Grocery household needs ,Eating out ,Clothing & apparel ,Transportation ,Medical & personal care ,Personal Expenses ,Household maintenance & conservancy ,Domestic Help ,Children care, education & enhancement program ,Dependant contributions ,Taxes ,Entertainment ,Festive Spending ,Vacations ,Charity ,Loan repayment ,Property loan repayment ,Vehicle loan repayment ,Life Insurance Premiums ,General Insurance Premiums ,Other expenses
Annual Expenses.

5. By Key-in in all these above details will generate its total calculation in Annual Expenses

Screenshot:

Activities Google Chrome ▾ Sat 11:18 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS Welcome, Salim

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

Dependant Needs

Expected Funds Inflow and Outflow

Contingency Planning

Retirement Planning

Life Insurance

Investments

Properties

Cash Assets

Financial Info Expected Funds Inflow and Outflow

SELF SPOUSE JOINT/FAMILY

Annual Expenditure - Outflow

Take a strategic approach to manage your finances by first identifying your annual expenses before mapping out what you hope to achieve financially over the next couple of years

	SELF	SPOUSE	JOINT/FAMILY
Rental for Lodgings	\$ 10	\$ 215	\$ 30
Utilities & communication	\$ 40	\$ 54	\$ 60
Grocery household needs	\$ 70	\$ 45	\$ 90
Eating out	\$ 100	\$ 6	\$ 5
Clothing & apparel	\$ 23	\$ 23	\$ 4
Transportation	\$ 5	\$ 54	\$ 8
Medical & personal care	\$ 109	\$ 45	\$ 12
Personal Expenses	\$ 222	\$ 223	\$ 150
Household maintenance & conservancy			\$ 160

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Activities Google Chrome ▾ Sat 11:19 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS Welcome, Salim

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

Dependant Needs

Expected Funds Inflow and Outflow

Contingency Planning

Retirement Planning

Life Insurance

Investments

Properties

Cash Assets

Financial Info Expected Funds Inflow and Outflow

SELF SPOUSE JOINT/FAMILY

Household maintenance & conservancy	\$ 160
Domestic Help	\$ 170
Children care, education & enhancement program	\$ 180
Dependant contributions	\$ 576
Taxes	\$ 190
Entertainment	\$ 122
Festive Spending	\$ 125
Vacations	\$ 128
Charity	\$ 131
Loan repayment	\$ 134
Property loan repayment	\$ 150
	\$ 11
	\$ 139

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Activities Google Chrome ▾ Sat 11:19 AM Avallis | FIPA - Google Chrome x

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

Dependant Needs

Expected Funds Inflow and Outflow

Contingency Planning

Retirement Planning

Life Insurance

Investments

Properties

Cash Assets

Financial Info Expected Funds Inflow and Outflow

	SELF	SPOUSE	JOINT/FAMILY
Household maintenance & conservancy	\$ 160		
Domestic Help	\$ 170		
Children care, education & enhancement program	\$ 180		
Dependant contributions	\$ 576	\$ 1500	
Taxes	\$ 190	\$ 80	\$ 121
Entertainment	\$ 122	\$ 32	\$ 124
Festive Spending	\$ 125	\$ 235	\$ 127
Vacations	\$ 128	\$ 65	\$ 130
Charity	\$ 131	\$ 89	\$ 133
Loan repayment	\$ 134	\$ 32	\$ 136
Property loan repayment	\$ 150	\$ 11	\$ 139
Vehicle loan repayment	\$ 168	\$ 276	

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6. A pop hover is given for providing a List of information on specific data

Activities Google Chrome ▾ Sat 11:23 AM Avallis | FIPA - Google Chrome x

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FIPA Financial Planning Application Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

Dependant Needs

Expected Funds Inflow and Outflow

Contingency Planning

Retirement Planning

Life Insurance

Investments

Properties

Cash Assets

Financial Info Expected Funds Inflow and Outflow

	SELF	SPOUSE	JOINT/FAMILY
Dependant contributions for Self, Spouse and Joint is reflected from total contribution in Dependant Particulars.	\$ 170		
	\$ 180		
Dependant contributions	\$ 576	\$ 1500	
Taxes	\$ 190	\$ 80	\$ 121
Entertainment	\$ 122	\$ 32	\$ 124
Festive Spending	\$ 125	\$ 235	\$ 127
Vacations	\$ 128	\$ 65	\$ 130
Charity	\$ 131	\$ 89	\$ 133
Loan repayment	\$ 134	\$ 32	\$ 136
Property loan repayment	\$ 150	\$ 11	\$ 139
Vehicle loan repayment	\$ 168	\$ 276	

Info
Dependant contributions for Self, Spouse and Joint is reflected from total contribution in Dependant Particulars.

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7. Button Icons which is placed near to the label specifies some calculation is being sync to its respective other screen.

Activities Google Chrome ▾ Sat 11:27 AM Avallis | FIPA - Google Chrome x

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

Expected Funds Inflow and Outflow			
	SELF	SPOUSE	JOINT/FAMILY
Festive Spending	\$ 125	\$ 235	\$ 127
Vacations	\$ 128	\$ 65	\$ 130
Property loan repayment	\$ 131	\$ 89	\$ 133
Vehicle loan repayment	\$ 134	\$ 32	\$ 136
Life Insurance Premiums	\$ 150	\$ 11	\$ 139
General Insurance Premiums	\$ 168	\$ 276	
Other expenses	\$ 0	\$ 0	\$ 0
Annual Expenses	\$ 145	\$ 87	\$ 147
	\$ 148	\$ 21	\$ 150
	\$ 2596	\$ 3093	\$ 2076

Info
More info about the Property Ownership Details upon clicking this icon

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Upon clicking those icons it automatically directs to other screen which contains detailed information.

Screen Name
: Financial Info
Sub Items
: Contingency Planning
Description:

1. Contingency planning details provides info of that your loved ones are provided for according to your wishes in the event of unforeseen circumstances.
2. It contains What is the % of living needs you would like to provide for your loved ones annually in order to live comfortably after **you or spouse** are gone?
3. It contains What is the % of living needs you would like to provide for your loved ones annually if **you / your spouse** are not able to work due to total permanent disability (TPD)?
4. It contains What is the % of living needs you would like to provide for your loved ones annually if **you / your spouse** are diagnosed with critical illness?
5. It contains Education funds to provide in the event of death/ TPD of self / spouse
6. It contains % of liabilities to be offset in event of death/TPD of self /spouse
7. It contains Last expenses \$

Screenshot:

The screenshot displays two instances of the FIPA software interface, both titled "Contingency Planning".

Client's Name: Abdul Jalil Bin Ismail **NRIC / FIN No.:** S1539887F

Financial Info **Contingency Planning**

Question 1: Ensure that your loved ones are provided for according to your wishes in the event of unforeseen circumstances.

In the event of your death, Total Permanent Disability or diagnosis with critical illness, how much money would you like to have annually for yourself and loved ones?

Self	\$ 11	Spouse	\$ 80
Children	\$ 56	Family	\$ 14

(The amount is based on assumption of annual expenditure required)

Question 2: 1a. What is the % of living needs you would like to provide for your loved ones annually in order to live comfortably after **you** are gone?

Spouse's Living needs	90 %	Children's Living needs	11 %	Family's Living needs	17 %
-----------------------	------	-------------------------	------	-----------------------	------

How many years do you intend to provide for your loved ones?

Spouse	18 yrs	Children	19 yrs	Family	20 yrs
--------	--------	----------	--------	--------	--------

Would your spouse be receiving any income in the event of your death?

Annual Income to be received by spouse	\$ 21	Number of Years	22 yrs
--	-------	-----------------	--------

Remarks: 23

Question 3: 1b. What is the % of living needs you would like to provide for yourself & loved ones annually in order to live comfortably after **your spouse** is gone?

Self's Living needs	11 %	Children's Living needs	12 %	Family's Living needs	13 %
---------------------	------	-------------------------	------	-----------------------	------

How many years do you intend to provide for yourself & love ones?

Self	14 yrs	Children	15 yrs	Family	16 yrs
------	--------	----------	--------	--------	--------

Would you be receiving any income in the event of your Self death?

Annual Income to be received by you	\$ 17	Number of Years	18 yrs
-------------------------------------	-------	-----------------	--------

Remarks:

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Activities Google Chrome Sat 11:37 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Financial Info Contingency Planning

19

2a. What is the % of living needs you would like to provide for your loved ones annually if you are not able to work due to total permanent disability (TPD)?

Self's Living needs	33	%	Spouse's Living needs	34	%
Children's Living needs	35	%	Family's Living needs	36	%

How many years do you intend to provide for your loved ones?

Self	37	yrs	Spouse	38	yrs
Children	39	yrs	Family	40	yrs

Would you be receiving any income in the event of TPD?

Annual Income to be received by Self	\$	41	Number of Years	42	yrs
--------------------------------------	----	----	-----------------	----	-----

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Activities Google Chrome Sat 11:37 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Financial Info Contingency Planning

19

2a. What is the % of living needs you would like to provide for your loved ones annually if you are not able to work due to total permanent disability (TPD)?

Self's Living needs	33	%	Spouse's Living needs	34	%
Children's Living needs	35	%	Family's Living needs	36	%

How many years do you intend to provide for your loved ones?

Self	37	yrs	Spouse	38	yrs
Children	39	yrs	Family	40	yrs

Would you be receiving any income in the event of TPD?

Annual Income to be received by Self	\$	41	Number of Years	42	yrs
--------------------------------------	----	----	-----------------	----	-----

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Activities Google Chrome Sat 11:37 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Financial Info Contingency Planning

Would your spouse be receiving any income in the event of TPD?

Annual Income to be received by spouse	\$	27	Number of Years	28	yrs
Annual medical expenses to provide for spouse	\$	29	Number of Years	30	yrs

Remarks
31

3a. What is the % of living needs you would like to provide for your loved ones annually if you are diagnosed with critical illness?

Self's Living needs	59	%	Spouse's Living needs	60	%
Children's Living needs	61	%	Family's Living needs	62	%

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Activities Google Chrome Sat 11:37 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Contingency Planning**

How many years do you intend to provide for your loved ones?

Self	63 yrs	Spouse	64 yrs
Children	65 yrs	Family	66 yrs

Would you be receiving any income in the event of diagnosis of critical illness?

Annual Income to be received by self	\$ 67	Number of Years	68 yrs
Other annual expenses for critical illness of self	\$ 69	Number of Years	70 yrs
Lump sum medical cost for critical illness of self	\$ 71		

Remarks
72

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Activities Google Chrome Sat 11:37 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Contingency Planning**

3b. What is the % of living needs you would like to provide for your loved ones annually if **your spouse** is diagnosed with critical illness?

Self's Living needs	15 %	Spouse's Living needs	13 %
Children's Living needs	14 %	Family's Living needs	80 %

How many years do you intend to provide for yourself & loved ones?

Self	11 yrs	Spouse	12 yrs
Children	13 yrs	Family	14 yrs

Would your spouse be receiving any income in the event of diagnosis of critical illness?

Annual Income to be received by spouse	\$ 15	Number of Years	16 yrs
Other annual expenses for critical illness of spouse	\$ 17	Number of Years	18 yrs
Lump sum medical cost for critical illness of spouse	\$ 19		

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Activities Google Chrome Sat 11:38 AM Avallis | FIPA - Google Chrome

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FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Contingency Planning**

4a. Education funds to provide in the event of death/ TPD of self / spouse

\$ 21	
-------	--

5. % of liabilities to be offset in event of death/TPD of self /spouse

Self	22 %	Spouse	32 %
------	------	--------	------

6. Last expenses \$

Self	\$ 90	Spouse	\$ 54
------	-------	--------	-------

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Screen Name : Financial Info
Sub items : Retirement Planning
Description:

Sub Section 1 : Retirement Details

1. Retirement planning section contains all retirement details of that client /spouse
2. Retirement age based on self/spouse is selected automatically its related yrs to retirement , Co-ordinate retirement age SELF / SPOUSE,Projected life expectancy (Age) , Projected Living years in retirement, Projected ROI after retirement are calculated for both self and spouse.
3. Based on these calculation , the data will be reflected on its related screens automatically. Each data reflection is indicated by toast message(alert messages).

Screenshots:

The screenshot shows the FIPA application interface for Retirement Planning. The left sidebar has a navigation menu with various options like Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info (which is currently selected), Contingency Planning, Retirement Planning (selected), Life Insurance, Investments, Properties, and Cash Assets. The main content area has tabs for 'Financial Info' and 'Retirement Planning'. Under 'Financial Info', there's a sub-tab for 'lMRP CF Analysis'. The 'Retirement Planning' tab is active. The 'Retirement Details' section contains several input fields:

- Intended retirement age*: 60 yrs (Self) and 55 yrs (Spouse)
- Retirement age based on*: Self, Yr to retirement: 4 yrs
- Coordinated retirement age*: 60 yrs (Self) and 14 yrs (Spouse)
- Projected life expectancy (Age)*: 90 yrs (Self) and 55 yrs (Spouse)
- Projected Living years in retirement*: 30 yrs (Self) and 36 yrs (Spouse)
- Projected ROI after retirement*: 11% (Self) and 12% (Spouse)
- Selected Retirement Sum (\$dRS): BRS - 88000 (Self) and BRS - 88000 (Spouse)

 Below this section is a 'CPF Life & Top-Up Details' section which is currently empty.

Sub Section 2 : CPF life & top-up details

4. On selecting the selection options such as I have pledged my property to CPF , Under Medical Grounds scheme? , Top up RA to ERS , Has existing annuity/ pension? The below table Funds Transfer from CPF Account to CPF life is been calculated.
5. By default when the profile loads , one row will be automatically added in Funds Transfer from CPF Account to CPF life.
6. Upon changing the Age and CPF life type automatically CPF Life Premium(\$),CPF Life Pay Out Income(\$),Funds Transferred From RA (\$) is calculated.

Sat 11:46 AM

Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

#	Select	Age	CPF Life Type	CPF Life Premium (\$)	CPF Life Pay Out Income (\$)	Funds Transferred From RA (\$)
1	<input type="checkbox"/>	65	Standard Plan	264000	8760	264000

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Sat 11:53 AM

Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

Description	Annual Amount Needed(\$)	Co-ordinated Retirement Age(yrs)	Projected Living Years in retirement(yrs)
Self	\$ 150	60 yrs	30 yrs
Spouse	\$ 800	14 yrs	36 yrs
Family	\$ 170	60 yrs	36 yrs

Disclaimer

- Assuming the property pledge made is sufficient.
- Members who didn't choose what CPF Life plans, would by default, fall under the Standard Plan.
- The CPF Life pay out is assumed to be paid out once member reaches the pay out eligibility age.
- The CPF Life pay out is an estimated amount, taking the minimum amount of the range given by CPF for the respective CPF Life plans.

Retirement Needs Living Needs during retirement(today's cost)

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Sub Section 3 : Retirement Needs

7. Living Needs during retirement(today's cost) is keyed in . Co-originated Retirement age and Projected living years in retirement value is fetched from Retirement Details section by default and its is overwritten

Activities Google Chrome Sat 11:53 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: **Abdul Jalil Bin Ismail** NRIC / FIN No.: **S1539887F**

New Profile **MASTERS** **Welcome, Salim**

Profile Search **Profile** **Types of Application** **Particulars** **Financial Goals** **Financial Info** **Dependant Needs** **Expected Funds Inflow and Outflow** **Contingency Planning** **Retirement Planning** **Life Insurance** **Investments** **Properties** **Cash Assets**

Financial Info **Retirement Planning**

CPF CF Analysis

	SELF	SPOUSE	FAMILY

Disclaimer

- Assuming the property pledge made is sufficient.
- Members who didn't choose what CPF Life plans, would by default, fall under the Standard Plan.
- The CPF Life pay out is assumed to be paid out once member reaches the pay out eligibility age.
- The CPF Life pay out is an estimated amount, taking the minimum amount of the range given by CPF for the respective CPF Life plans.

Retirement Needs Living Needs during retirement(today's cost)

Description	Annual Amount Needed(\$)	Co-ordinated Retirement Age(yrs)	Projected Living Years in retirement(yrs)
Self	\$ 150	60 yrs	30 yrs
Spouse	\$ 800	14 yrs	36 yrs
Family	\$ 170	60 yrs	36 yrs

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Sub Section 4 : Other payment to be make during retirement

8. If Frequency Single is selected Escalation Rate and Age payment end will be disable(field cant be edited).

Activities Google Chrome ▾ Sat 11:58 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning iMFP CF Analysis SELF SPOUSE FAMILY

Other payment to be made during retirement

Type of payment*	Age Based On*
Frequency*	--SELECT-- yrs
Annual Expenditure \$	Age payment ends yrs
Escalation Rate %	Remarks

Add Close

3 TEST2 REGULAR 900 21 SELF 60 90 TESTING

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Activities Google Chrome ▾ Sat 11:53 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning iMFP CF Analysis SELF SPOUSE FAMILY

Other payment to be made during retirement

Showing 1 to 3 of 3 entries

#	Types of payment*	Frequency*	Annual Expenditure (\$)	Escalation (%)	Age Based on*	Age Payment Starts (yrs)*	Age Payment Ends (yrs)	Remarks
1	TEST1	REGULAR	150	23	SELF	60	90	TEST
2	Payment18000	REGULAR	800	23	SELF	60	90	56
3	TEST2	REGULAR	900	21	SELF	60	90	TESTing

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Sub Section 5 : Income to be received during retirement

9. If Frequency Single is selected Escalation Rate and Age payment end will be disable(field cant be edited).

Activities Google Chrome Sat 11:58 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning

Additional income and assets to be received on retirement

Classification*	ROI %
Description	Age Based On* --SELECT--
Frequency* --SELECT--	Age payment starts* yrs
Amount of income \$	Age payment end yrs
Escalation Rate %	

Add Close

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Activities Google Chrome Sat 11:53 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning

Income to be received during retirement

Showing 1 to 3 of 3 entries

#	Classification*	Description	Frequency*	Amount of Income (\$)	Escalation Rate (%)	ROI (%)	Age Based on*	Age Incom Starts (yrs)*
1	Class2	Desc2	REGULAR	800	12	13	SELF	60
2	Class37900	Desc34500	REGULAR	8000	23	24	SELF	60
3	Class1	Desc1	SINGLE	9000		12	SELF	60

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Sub Section 6 : Income and assets available for retirement

10. If Frequency Single is selected Escalation Rate and Age payment end will be disable(field cant be edited).

Activities Google Chrome ▾ Sat 12:01 PM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning iMFRP CF Analysis SELF SPOUSE FAMILY

Income and assets available for retirement

Classification*	ROI %
Description	Age Based On* --SELECT--
Frequency* --SELECT--	Age payment starts* yrs
Amount of income \$	Age payment ends yrs
Escalation Rate %	

Add Close

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Activities Google Chrome ▾ Sat 11:53 AM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Abdul Jalil Bin Ismail NRIC / FIN No.: S1539887F

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Retirement Planning iMFRP CF Analysis SELF SPOUSE FAMILY

Income and assets available for retirement

Showing 1 to 12 of 12 entries

#	<input type="checkbox"/>	Classification*	Description	Frequency*	Amount of Income (\$)	Escalation Rate (%)	ROI (%)	Age Based on*	Age Income Starts (yrs)*
1	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
2	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
3	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
4	<input type="checkbox"/>	Properties	test	REGULAR ▾	180	0	0	SPOL ▾	60

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Sub Section 7 : RP CF Analysis

- 11.** Retirement Planning Cash Flow Analysis is design in order to show a graphical representation and auto generation of calculated tables
- 12.** Upon clicking a RP CF Analysis on Top left corner a pop-up appears with all Retirement planning details from Retirement planning Section 4,5,6 . Also we can able to add new rows which is highlighted by another color.
- 13.** For each time multiple entries are provided , it related calculation is automatically displayed with proper graphical Chart representation .
- 14.** This Screen alone can be generated into PDF format upon clicking PDF button.

Activities Google Chrome ▾ Sat 12:06 PM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00CFBC664518F68846A3D611C9BB7875

Retirement Cash Flow Analysis Client's Name Abdul Jallil Bin Ismail Spouse's Name Spouse Testing

Age 56 Age 15 Close

Assumption			Living Needs during retirement(today's cost)				
	Self	Spouse	Family	Desc.	Annual Amount Needed (\$)	Co-ordinated Retirement Age(yrs)	Proj. Living Yrs. in Retirement(yrs)
Intended retirement age*	60 yrs	55 yrs		Self	\$ 150	60 yrs	30 yrs
Retirement age based on*	Self			Spouse	\$ 800	14 yrs	36 yrs
Yrs to retirement*	4 yrs			Family	\$ 170	60 yrs	36 yrs
Coordinated retirement age*	60 yrs	14 yrs					
Projected life expectancy(Age)*	90 yrs	55 yrs					
Projected living yrs in retirement*	30 yrs	36 yrs	36 yrs				
Projected ROI after retirement*	11 %	12 %	13 %				
Inflation Rate*		14 %					
Assumed Effective Investment Rate(after retirement)*		-2.632 %					

Activities Google Chrome ▾ Sat 12:07 PM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00CFBC664518F68846A3D611C9BB7875

Retirement Cash Flow Analysis Client's Name Abdul Jallil Bin Ismail Spouse's Name Spouse Testing

Age 56 Age 15 Close

Other payment to be made during retirement									
Showing 1 to 3 of 3 entries									
#	<input type="checkbox"/>	Type of Payment*	Frequency*	Annual Expenditure(\$)	Escalation Rate(%)	Age Based On*	Age Payment Starts(yrs)*	Age Payment Ends(yrs)	Remarks
1	<input type="checkbox"/>	TEST1	REGULAI	150	23	SELF	60	90	TEST
2	<input type="checkbox"/>	Payment18000	REGULAI	800	23	SELF	60	90	56
3	<input type="checkbox"/>	TEST2	REGULAI	900	21	SELF	60	90	TESTing

Projected Expenditure Details on retirement This analysis will appear as input of the expenditure is keyed in

Retirement Age Based On **SELF**

Showing 1 to 31 of 31 entries

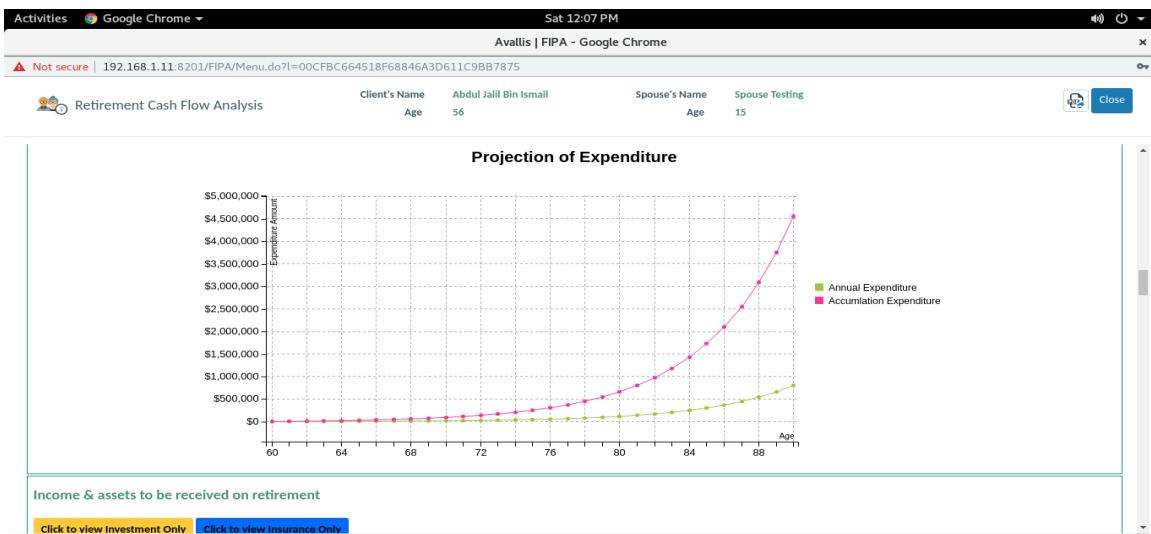
Activities Google Chrome Sat 12:07 PM Avallis | FIPA - Google Chrome

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Retirement Cash Flow Analysis Client's Name Abdul Jall Bin Ismail Spouse's Name Spouse Testing

Show 1 to 31 of 31 entries

Self Age	Spouse Age	Self	Spouse	Family	Rel.% Adjustment	Adjusted Family Expenditure(\$)	TEST1	Payment18000	TEST2	Net Annual Expenditure(\$)	Total Accumulation Expenditure(\$)
60	55	\$150	\$800	\$170	100	\$1,120	\$150	\$800	\$900	\$2,970	\$2,970
61	56	\$171	\$912	\$194	100	\$1,277	\$185	\$984	\$1,089	\$3,533	\$6,505
62	57	\$195	\$1,040	\$221	100	\$1,456	\$228	\$1,210	\$1,318	\$4,212	\$10,717
63	58	\$222	\$1,185	\$252	100	\$1,659	\$280	\$1,488	\$1,595	\$5,022	\$15,739
64	59	\$253	\$1,351	\$287	100	\$1,892	\$344	\$1,830	\$1,930	\$5,996	\$21,735
65	60	\$289	\$1,540	\$327	100	\$2,156	\$423	\$2,251	\$2,335	\$7,165	\$28,900
66	61	\$329	\$1,756	\$373	100	\$2,458	\$520	\$2,769	\$2,825	\$8,572	\$37,472
67	62	\$375	\$2,002	\$425	100	\$2,803	\$640	\$3,406	\$3,418	\$10,267	\$47,739
68	63	\$428	\$2,282	\$485	100	\$3,195	\$787	\$4,189	\$4,136	\$12,307	\$60,046
69	64	\$488	\$2,602	\$553	100	\$3,642	\$968	\$5,152	\$5,005	\$14,767	\$74,813
70	65	\$556	\$2,966	\$630	100	\$4,152	\$1,191	\$6,337	\$6,056	\$17,736	\$92,549



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Retirement Cash Flow Analysis Client's Name Abdul Jall Bin Ismail Spouse's Name Spouse Testing

Income & assets to be received on retirement

Click to view Investment Only Click to view Insurance Only

Showing 0 to 0 of 0 entries

#	Select	Classification*	Descriptions	Frequency*	Total Income Received(s) Disbursement	Escalation Rate(%)	ROI(%)	Age Based on*	Age Income Starts(yrs)*	Age Income Ends(yrs)*
No data available in table										

Income to be received during retirement

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Retirement Cash Flow Analysis Client's Name Abdul Jalil Bin Ismail Spouse's Name Spouse Testing Age 56 Age 15 Close

Showing 1 to 3 of 3 entries

#	<input type="checkbox"/>	Classification*	Descriptions	Frequency*	Total Income Received(\$)	Escalation Rate(%)	ROI(%)	Age Based on*	Age Income Starts(yrs)*	Age Income Ends(yrs)
1	<input type="checkbox"/>	Class2	Desc2	REGULAR ▾	800	12	13	SELF ▾	60	90
2	<input type="checkbox"/>	Class37900	Desc34500	REGULAR ▾	8000	23	24	SELF ▾	60	90
3	<input type="checkbox"/>	Class1	Desc1	SINGLE ▾	9000		12	SELF ▾	60	

Income and assets available for retirement

chrome-extension://jafmfnfnkoekkdocjajpcnmkklaajd/popup.html?errors=TypeError%3A Cannot read property %27toUpperCase%27 of undefined<br%2F>%26nbsp%3B%2FFIPA%2Fjs%2Frdcflw.inplncme.j... Activities Google Chrome Sat 12:09 PM Avallis | FIPA - Google Chrome

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Retirement Cash Flow Analysis Client's Name Abdul Jalil Bin Ismail Spouse's Name Spouse Testing Age 56 Age 15 Close

Income and assets available for retirement

Showing 1 to 12 of 12 entries

#	<input type="checkbox"/>	Classification*	Descriptions	Frequency*	Total Income Received(\$)	Escalation Rate(%)	ROI(%)	Age Based on*	Age Income Starts(yrs)*
1	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
2	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
3	<input type="checkbox"/>	Cash At Bank	12	SINGLE ▾	27		0	SELF ▾	60
4	<input type="checkbox"/>	Properties	test	REGULAR ▾	180	0	0	SPOUSE ▾	60

Projected Income available on retirement

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Retirement Cash Flow Analysis Client's Name Abdul Jall Bin Ismail Spouse's Name Spouse Testing

Age 56 Age 15 Close

Showing 1 to 31 of 31 entries

nk	Cash At Bank	Properties	Cash At Bank	Investment	Investment	Investment	Class11	Insurance	Insurance	Cash At Bank	Total Annual Income(\$)	Total Accumulation Income(\$)
	12	test	12	Henderson	Henderson	FORTIS	Desc11	test	test	12		
\$27	\$27	\$23	\$27	\$10	\$10		\$8,000	\$23	\$23	\$27	\$26,024	\$26,024
		\$26		\$10	\$10		\$8,960	\$26	\$26		\$19,794	\$45,818
		\$29		\$10	\$10		\$10,035	\$29	\$29		\$23,249	\$69,067
		\$32		\$10	\$10		\$11,239	\$32	\$32		\$27,366	\$96,433
		\$36		\$10	\$10		\$12,588	\$36	\$36		\$32,286	\$128,719
		\$40		\$10	\$10	\$1,500,352	\$14,099	\$40	\$40		\$1,538,524	\$1,667,243
		\$45		\$10	\$10	\$1,500,352	\$15,791	\$45	\$45		\$1,545,580	\$3,212,823
		\$50		\$10	\$10	\$1,500,352	\$17,686	\$50	\$50		\$1,554,051	\$4,765,874
		\$56		\$10	\$10	\$1,500,352	\$19,808	\$56	\$56		\$1,564,240	\$6,331,114
		\$63		\$10	\$10	\$1,500,352	\$22,185	\$63	\$63		\$1,576,516	\$7,907,630
		\$71		\$10	\$10	\$1,500,352	\$22,827	\$71	\$71		\$1,580,516	\$10,481,144



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Retirement Cash Flow Analysis Client's Name Abdul Jalil Bin Ismail Spouse's Name Spouse Testing Age 56 Age 15

Click to move Income section **Click to move expenditure section**

Amount of buffer fund to set aside on retirement: Interest rates for buffer fund: % Investment returns expected on balance of retirement funds: %

Annual Based Accumulation Based

Showing 1 to 31 of 31 entries

Self Age	Spouse Age	Buffer Fund for Retirement	Current Cash Funds on Retirement	Annual Income	Annual Expenditure	Available Retirement Funds - (Surplus/ deficit)
60	55	\$0	\$26,024	\$2,970	\$23,054	
61	56	\$0	\$23,054	\$19,794	\$3,555	
62	57	\$0	\$16,259	\$23,249	\$4,212	
63	58	\$0	\$19,037	\$27,366	\$5,022	
64	59	\$0	\$22,344	\$32,286	\$5,996	
65	60	\$0	\$26,290	\$1,538,524	\$7,165	
						\$1,531,359

Cashflow Projection on Retirement

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Activities Google Chrome ▾ Sat 12:09 PM Avallis | FIPA - Google Chrome

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Retirement Cash Flow Analysis Client's Name Abdul Jalil Bin Ismail Spouse's Name Spouse Testing Age 56 Age 15

Self Age	Spouse Age	Buffer Fund for Retirement	Current Cash Funds on Retirement	Annual Income	Annual Expenditure	Available Retirement Funds - (Surplus/ deficit)
72	67	\$0	\$1,587,895	\$1,630,857	\$25,653	\$1,605,204
73	68	\$0	\$1,605,204	\$1,657,068	\$30,890	\$1,626,178
74	69	\$0	\$1,626,178	\$1,688,851	\$37,226	\$1,651,625
75	70	\$0	\$1,651,625	\$1,727,435	\$44,896	\$1,682,539
76	71	\$0	\$1,682,539	\$1,774,318	\$54,189	\$1,720,129
77	72	\$0	\$1,720,129	\$1,831,344	\$65,452	\$1,765,892
78	73	\$0	\$1,765,892	\$1,900,768	\$79,111	\$1,821,657
79	74	\$0	\$1,821,657	\$1,985,355	\$95,684	\$1,889,671
80	75	\$0	\$1,889,671	\$2,088,499	\$115,803	\$1,972,696
81	76	\$0	\$1,972,696	\$2,214,358	\$140,237	\$2,074,121
82	77	\$0	\$2,074,121	\$2,368,035	\$169,926	\$2,198,109
83	78	\$0	\$2,198,109	\$2,555,793	\$206,016	\$2,349,777
84	79	\$0	\$2,349,777	\$2,785,299	\$249,904	\$2,535,395
85	80	\$0	\$2,535,395	\$3,066,027	\$303,295	\$2,762,732

Available retirement funds - (Surplus/ deficit)

Screen Name : Financial Info

Sub Item : Life Insurance

Description:

Tab I : Existing policy

1. While profile is loaded for FPMS client , his/her policy details from FPMS will be loaded directed into the Life & Health Insurance (Plan Details) and UT and ILP (Fund Details)



2. FPMS Existing policy will be denoted by and FIPA newly added policy will be denoted by symbol under Existing policies tables.



3. If the client need to edit the FPMS policy , click on the icon to fetch details into Another tab Life Insurance and Plan Details in which the client can edit the details upon whole save the edited detail will be added a New FIPA policy and populated into the Existing policy table .

4. Only FIPA policy can be deleted and No provision is given for FPMS policy.

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim ▾

Financial Info Life Insurance

Existing policies

Existing Policies (Below information are retrieved from FPMS. For more policy details, please click

Life & Health Insurance (Plan Details)

#	Application	Insurer	Proposed	Life Assured	Policy No.	Enh.
1	FIPA	NTUC Income	Mohamed Salim Bin Mohd Amin	Mohamed Salim Bin Mohd Amin	92187838	Enh.
2	FIPA	China Insurance Co (Singapore) Pte Ltd	Mohamed Salim Bin Mohd Amin	Mohamed Salim Bin Mohd Amin	950	Enh.
3	FPMSNL	NTUC Income	Mohamed Salim Bin Mohd Amin	Ariel Salim	92187854	Enh.
4	FPMSNL	NTUC Income	Mohamed Salim Bin Mohd Amin	Danielle Salim	92187838	Enh.
5	FPMSNL	NTUC Income	Mohamed Salim Bin Mohd Amin	Aaron Salim	92187837	Enh.
6	FPMSNL	NTUC Income	Mohamed Salim Bin Mohd Amin	Mohamed Salim Bin Mohd Amin	92190469	Enh.
7	FPMSNL	Keppel Insurance Pte Ltd	Mohamed Salim Bin Mohd Amin	Mohamed Salim Bin Mohd Amin	10047339	Enh.

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim ▾

Financial Info Life Insurance

Existing policies

UT and ILP (Fund Details)

#	Application	Insurer	Proposed	Life Assured	Policy No.	Enh.
1	FPMSNL	Keppel Insurance Pte Ltd	Mohamed Salim Bin Mohd Amin	Mohamed Salim Bin Mohd Amin	10047339	Keppel

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5. Upon clicking FPMS Policy or FIPA Policy , “Life Insurance Tab and Plan Details Tab will be opened”.

TAB 2 : Life Insurance

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FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996

New Profile MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Plan Details

Owner / Proposed*: Self
Life Assured*: Mohamed Salim Bin Mohd Amin
 No child found!
Insurance Company*: NTUC Income
Policy No.*: 92187838
Policy Status*: INFORCE
Type of Plan: --SELECT--
Inc. Date of policy (DD/MM/YYYY)*: 01/10/2008
Expiry Date (DD/MM/YYYY):
Frequency of payments: ANNUALLY
Name of Main Plan: Enhanced Incomeshield Preferre
Obj. of Insurance: Nil
Current Bonus accumulation: \$ 0
Current Cash Value: \$ 0
Maturity Value: \$
Maturity Date(DD/MM/YYYY):
Outstanding Loan: \$
Types Of Nominee: --SELECT--
Third Party Name: --SELECT--

All fields marked in maroon are required

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FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996

New Profile MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Plan Details

Insurance Company*: NTUC Income
Policy No.*: 92187838
Policy Status*: INFORCE
Type of Plan: --SELECT--
Inc. Date of policy (DD/MM/YYYY)*: 01/10/2008
Expiry Date (DD/MM/YYYY):
Frequency of payments: ANNUALLY
Payment method: GIRO - OTHERS
Source of Premium: --SELECT--
Sum Assured: \$ 1
Current Bonus accumulation: \$ 0
Current Cash Value: \$ 0
Maturity Value: \$
Maturity Date(DD/MM/YYYY):
Outstanding Loan: \$
Types Of Nominee: --SELECT--
Third Party Name: --SELECT--
Remarks:
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TAB 3 : Plan Details

6. Both basic and rider details are separated in table . For Each basic plans , multiple rider can be added .
7. Toggle between Basic and Rider details is possible . Upon on selected one basic row , its related rider will be visible in Rider Table.
8. If you need to make visible all riders plan details click on checkbox above the rider details to display all rider plans.
9. Multiple Coverage details can be added for both basic and rider plan details.
10. By Adding , if the plan is related to CPF , some data will be taken and added a new entry into CPF addition and deduction table under Central Provident Fund Screen
11. By Adding , if the plan is related to CASH , some data calculation is done automatically and reflected to the Cash Flow Statement under Expected Inflow and Outflow screen.

SCREENSHOTS:
BASIC PLAN DETAILS

Life Insurance - Plan Details

Plan Name*	Payment method
--SELECT--	--SELECT--
Basic / Rider*	Coverage Benefits
--SELECT--	None selected
Premium Term*	Inception Date (DD/MM/YYYY)*
Years	01/10/2008
Sum Assured	Expiry Date (DD/MM/YYYY)
\$	01/10/2018
Premium Amount	Remarks
\$	
Payment Mode	
--SELECT--	

Sum Assured and Premium Calculation - Basic(B) & Rider (R)

Total Sum Assured(B):	1.00	Total Annual Premium(B+R):	143.00					
Basic Plan								
Showing 1 to 3 of 3 entries								
#	Select	Plan Name*	Basic*	Premium Term*	Sum Assured(\$)	Premium Amount(\$)	Payment Mode	Pay Met
1	<input type="radio"/>	a	BASIC	1	1	1	HALF YEARLY	--SELECT--
2	<input type="radio"/>	Enhanced IncomeShield Preferred	BASIC	0		131	ANNUALLY	GIRO
3	<input type="radio"/>	cash1	BASIC	10		10	ANNUALLY	GIRO

RIDER PLAN DETAILS

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Life Insurance

Life Insurance - Rider/Benefit plan Details

Plan Name*	Payment method
Rider / Benefit*	None selected
Premium Term*	Inception Date (DD/MM/YYYY)*
Sum Assured	Expiry Date (DD/MM/YYYY)
Premium Amount	Remarks
Payment Mode	

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Life Insurance

Existing policies Life Insurance Plan Details

Sum Assured and Premium Calculation - Basic(B) & Rider (R)

Total Sum Assured(B):	1.00	Total Annual Premium(B+R):	143.00
-----------------------	------	----------------------------	--------

Rider Plan Select any plan to add new benefits or Rider plan details

Check to display all rider plans

Showing 1 to 1 of 1 entries

#	Select	Plan Name*	Rider/Benefit*	Premium Term*	Sum Assured(\$)	Premium Amount(\$)	Payment Mode

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12. Upon selecting multiple Coverage plans , respective Tabs will be opened to key in details. It is applied separately for each records of Basic plans and Rider Plans.

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FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

- Dependant Needs
- Expected Funds Inflow and Outflow
- Contingency Planning
- Retirement Planning

Life Insurance

Investments

Properties

Cash Assets ▾

Financial Info Life Insurance

Life Insurance - Plan Details

Plan Name* Cash1 Payment method GIRO - POSB

Basic / Rider* BASIC Coverage Benefits All selected (6) ▾

Inception Date (DD/MM/YYYY)* Expiry Date (DD/MM/YYYY) Remarks

Premium Term* Years 10 Select all

Sum Assured \$ 10 Critical Illness

Premium Amount \$ 10 Hospitalisation

Payment Mode ANNUALLY Education

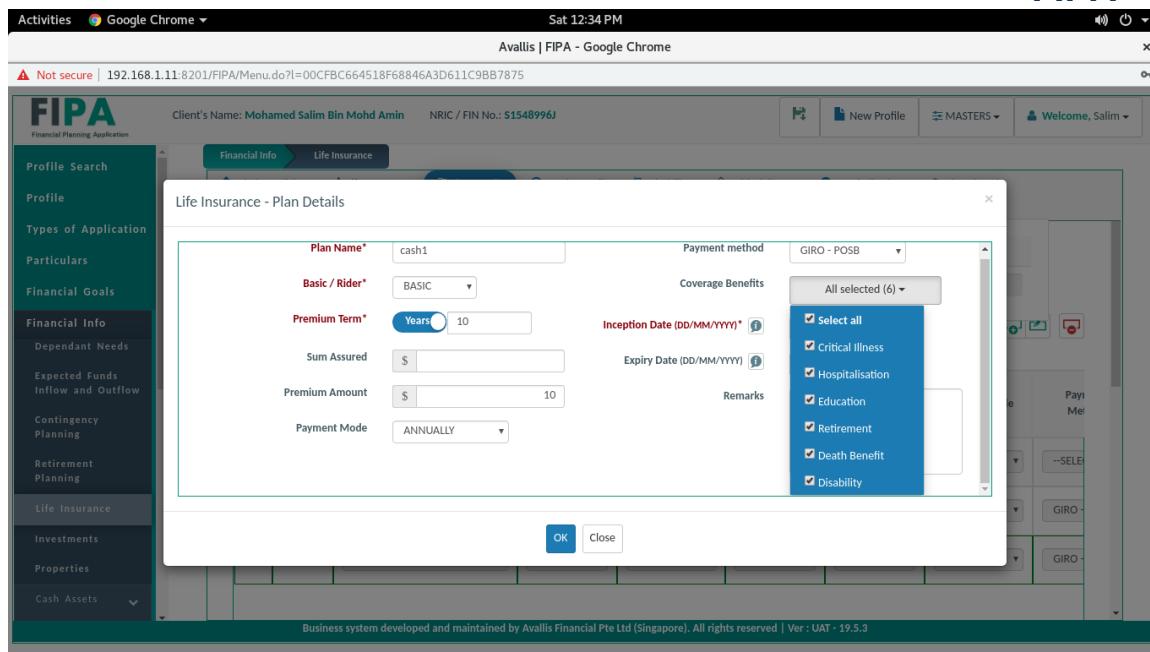
Retirement

Death Benefit

Disability

OK Close

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TAB 4 : Death Benefit

13. Multiple Entries of death benefit details

14. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.

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FIPA Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S15489961 MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Showing 1 to 2 of 2 entries

#		Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Term of coverage(yrs)*	Death Benefit(s)*
1	<input type="checkbox"/>	cash1	01/10/2019		132	123
2	<input type="checkbox"/>	cash1	01/10/2019		2	12

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FIPA Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S15489961 MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Life Insurance - Death Benefit Details

Plan Details

Plan Name: cash1
Inception Date (DD/MM/YYYY): 01/10/2019
Expiry Date (DD/MM/YYYY):

Death Benefits

Term of Coverage*: yrs
Death Benefit*: \$

Add Close

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TAB 5 : Disability

15. Multiple Entries of death benefit details

16. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.

17. Year benefit to be payable field for begin and cease a validation is done . As Begin should start with Year Begins should be 0 or greater than Year Ceases! And

Year Ceases should be greater than Year Begins !

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FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS ▾ Welcome, Salim ▾

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit **Disability** Critical Illness Hospitalisation Retirement Plg FIPA Notification

Education Plg Health Insurance

Life Insurance - Disability changes updated successfully

Showing 1 to 2 of 2 entries

#		Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date	Types of Disability*	Yr benefit to be payable	Benefits(\$)	
1	<input type="checkbox"/>	cash1	01/10/2019		Income Disabiliti	1	3	12
2	<input type="checkbox"/>	cash1	01/10/2019		Income Disabiliti	12	17	3

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FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS ▾ Welcome, Salim ▾

Financial Info Life Insurance

Life Insurance - Disability Details

Plan Details Plan Details cash1 Inception Date(DD/MM/YYYY) 01/10/2019 Expiry Date (DD/MM/YYYY)

Disability Details Types of Disability* --SELECT--

Year benefit to be payable

Year Begins* Year Ceases*

Benefit \$ Increment of Benefits %

Add Close

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TAB 6 : Critical Illness

18. Multiple Entries of death benefit details

19. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.

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Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Showing 1 to 2 of 2 entries

#	Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Stages / Level of DD*	Benefit Amount(s)*	Term Of Benefit(yrs)*	R
1	cash1	01/10/2019		Early Stage	23	3	3
2	cash1	01/10/2019		Advanced Stage	23	3	3

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Activities Google Chrome ▾ Sat 12:39 PM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Life Insurance - Critical Illness Details

Plan Details

Plan Details	cash1
Inception Date(DD/MM/YYYY)	01/10/2019
Expiry Date (DD/MM/YYYY)	

Critical Illness

Stages / Level of DD*	--SELECT--
Benefit Amount*	\$
Term of Benefit*	yrs
Remarks	

Add Close

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TAB 7 : Hospitalization

20. Multiple Entries of death benefit details

21. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.

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FIPA Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S15489961 New Profile MASTERS Welcome, Salim

Financial Info Life Insurance Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Profile Search Profile Types of Application Particulars Financial Goals

Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Showing 1 to 2 of 2 entries

#	Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Annual Premium(\$)*	Class of Benefit*	Term of Coverage(yrs)*	Deductible(\$)*
1	cash1	01/10/2019		43	23	23	24
2	cash1	01/10/2019		23	5	23	32

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Activities Google Chrome Sat 12:39 PM Avallis | FIPA - Google Chrome

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FIPA Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S15489961 New Profile MASTERS Welcome, Salim

Financial Info Life Insurance Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg

Profile Search Profile Types of Application Particulars Financial Goals

Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Life Insurance - Hospitalisation Details

Plan Details

Plan Details	cash1
Inception Date (DD/MM/YYYY)	01/10/2019
Expiry Date (DD/MM/YYYY)	

Hospitality

Annual Premium (\$)*	\$
Class of Benefit*	
Term of Coverage*	yrs
Deductible (\$)*	\$
Co-insurance (%)	%

Add Close

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TAB 8 : Retirement planning

22. Multiple Entries of retirement details based on disbursement selection
23. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.
24. Some Details are by default fetched from Retirement planning Screen and Current Assumption Screen.
25. If Will there be multiple disbursement of income of retirement is “Yes” , Add multiple row under Input Multiple Income and maturity values to be received on retirement.For each row is added some data will be added as new record in Income and assets available for retirement table in Retirement planning screen.
26. If Will there be multiple disbursement of income of retirement is “No”, Key in Cash value on retirement , % to be used for retirement and Age to be received cash value on Retirement . One Row will be added into Retirement screen other data from
- Input Multiple Income and maturity values to be received on retirement will be deleted automatically.

Sat 12:40 PM

Avallis | FIPA - Google Chrome

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FIPA
Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg

Education Plg Health Insurance

Coordinated Retirement age of Self 60 yrs Will there be multiple disbursement of income at retirement --SELECT--

Coordinated Retirement age of Spouse 146 yrs Cash Value On Retirement \$

Years to retirement 4 yrs % to be used for Retirement %

Interest Rate Used 11 % Age to be received Cash value on Retirement yrs

Input Multiple Income and Maturity values to be received on retirement

Showing 0 to 0 of 0 entries

#	Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Age Income Starts(yrs)*	Age Income Ends(yrs)*	Escalation Rate%*	Guaranteed Income(s)
No data available in table							

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Sat 12:40 PM

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FIPA
Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

Life Insurance - Retirement Planning Details

Plan Details

Plan Details cash1
Inception Date(DD/MM/YYYY) 01/10/2019
Expiry Date (DD/MM/YYYY)

Retirement Planning

Age Income Starts* yrs
Age Income Ends* yrs
Escalation rate* %

Retirement Planning

Gtd Income to be received fr policy \$
Non-Gtd Income to be received fr policy \$
Total Income received \$
Assumed Bank Interest Rate 11 %

Remarks

Add Close

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Activities Google Chrome ▾ Sat 12:41 PM Avallis | FIPA - Google Chrome x

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875 0v

FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS ▾ Welcome, Salim ▾

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

- Dependant Needs
- Expected Funds Inflow and Outflow
- Contingency Planning
- Retirement Planning
- Life Insurance**
- Investments
- Properties
- Cash Assets

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg Education Plg Health Insurance

Input Multiple Income and Maturity values to be received on retirement

Showing 1 to 1 of 1 entries

#	<input type="checkbox"/>	Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Age Income Starts(yrs)*	Age Income Ends(yrs)*	Escalation Rate(%)*	Guaranteed Income(\$)	
1	<input type="checkbox"/>	cash1	01/10/2019		60	90	12	125	

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TAB 9 : Education planning

27. Multiple Entries of education planning details
28. Selected Plan Name , Expiry date and inception date is displayed by default while Add Row.
29. Add Row pop - up appears can add multiple payment for each children details.
30. Children details are fetched from Children particular screen.

Activities Google Chrome ▾ Sat 12:44 PM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS Welcome, Salim

Financial Info Life Insurance

Existing policies Life Insurance Plan Details Death Benefit Disability Critical Illness Hospitalisation Retirement Plg

Education Plg Health Insurance

Showing 1 to 2 of 2 entries

#	Name of child*	Plan Name	Inception Date (DD/MM/YYYY)	Expiry Date (DD/MM/YYYY)	Tertiary education age(yrs)*	Bank interest rate(%)*	Inflation rate(%)
1	Child1	cash1	01/10/2019		12	11	
2	Child1	cash1	01/10/2019		22	11	

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Activities Google Chrome ▾ Sat 12:41 PM Avallis | FIPA - Google Chrome

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

New Profile MASTERS Welcome, Salim

Life Insurance - Education Planning Details

Plan Details

Plan Details cash1
Inception Date(DD/MM/YYYY) 01/10/2019
Expiry Date (DD/MM/YYYY)

Education Planning

Name of child* --SELECT-- No child found!
Tertiary education age(yrs)* yrs
Bank int rate* 11 %
Inflation rate 12 %

Showing 0 to 0 of 0 entries

#	Select	Income Pay Out Age(yrs)	Annual Pay Out Amount(\$)	PV/FV of Total Pay Out Amount(\$)
No data available in table				

Add Close

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TAB 10 : Health Insurance

31. Data entry screen contains personal priorities for Health Insurance concerns.

The screenshot shows a Google Chrome browser window with the following details:

- Address Bar:** Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875
- Header:** Sat 12:44 PM, Avallis | FIPA - Google Chrome
- Right Side:** Activities, Google Chrome, Power, Close, Minimize, Maximize.
- Top Right:** FIPA logo, New Profile, MASTERS, Welcome, Salim.
- Left Sidebar (Vertical):**
 - Profile Search
 - Profile
 - Types of Application
 - Particulars
 - Financial Goals** (selected)
 - Dependant Needs
 - Expected Funds Inflow and Outflow
 - Contingency Planning
 - Retirement Planning
 - Life Insurance** (selected)
 - Investments
 - Properties
 - Cash Assets
- Top Navigation:** Financial Info, Life Insurance, Existing policies, Life Insurance, Plan Details, Death Benefit, Disability, Critical Illness, Hospitalisation, Retirement Plg, Education Plg, Health Insurance.
- Section: Information on Health Insurance Needs**

Personal Priorities - select your health insurance concerns

	High / Med / Low
Cover For Hospitalisation Expenses	--SELECT--
Cover For Outpatient Medical Expenses	--SELECT--
Cover For Major Illnesses(eg. Cancer, kidney dialysis,etc)	--SELECT--
Cover Dental Expenses	--SELECT--
Cover For Old Age Disabilities	--SELECT--
Cover For Loss Income Due To Illness Or Sickness	--SELECT--

Replacement Of Health Insurance Policies

Are you intending to replace any existing health insurance policy? If yes, Why?

--SELECT--
- Bottom:** Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3

Screen Name : Financial Info

Sub Item : Investment

Description:

1. It contains investment details for Ownership based on Self , Spouse or Joint.
2. Names of Institutions list from AVIS data list of fund Managers.On selecting particular manager its fund category will be listed in Description of Investment
3. Based on Payment Method is "Cash" - some data reflected into Cash Flow Statement
4. if Payment Method is "CPFQO,CPFSA,CPFMA,CPFRA" - some data adds a record into Central Provident Fund Screen in CPF Addition and Deduction table.
5. If Payment Method is "SRS" some calculated data will be displayed under SRS screen. These reflection is only based on Dividend Reinvested is "No".
6. Then If Obj. of investment is "Retirement" so some data adds a record into retirement planning screen.

Activities Google Chrome ▾ Sat 1:05 PM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

Investment Details

Investment Details

Ownership of Investment*	--SELECT--
Types of Investment*	--SELECT--
Name of FA/Broker/Secu.house	Avallis Financial Pte Ltd
Analysis By Portfolio	--SELECT--
Names of Institutions ⓘ	--SELECT--
Description of Investment ⓘ	--SELECT--
Estimated Investment rate ⓘ	%
Amount Invested	\$

NAV Details

Date Invested (DD/MM/YYYY)*	<input type="text"/>
Last NAV price	\$ <input type="text"/> NAV <input type="button" value="CALC"/>
No. of units	<input type="text"/>
Current NAV	<input type="text"/>
Remarks	<input type="text"/>

Regular Investment Plan

Any reg. inv. plan	--SELECT--
RSP Amount	\$ <input type="text"/>
Frequency	--SELECT--
No.of Yrs of Regular Investment	<input type="text"/> yrs

Investment Objective

Obj. of investment	--SELECT--
--------------------	------------

Add **Close**

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Activities Google Chrome ▾ Sat 1:05 PM Avallis | FIPA - Google Chrome

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Investment Details

Dividend Details

Estimated Investment rate ⓘ	%
Amount Invested	\$
Payment Method	--SELECT--

Disbursement Plan

Dividend Reinvested	--SELECT--
Dividend Based On ⓘ	--SELECT--
PAR value(\$)	\$ <input type="text"/>
Dividend Rate	% <input type="text"/>
Dividend Payment Mode	--SELECT--
Dividend Amount per Annum(\$) ⓘ	\$ <input type="text"/>

Obj. of investment

--SELECT--

Basis of Disbursement of Investment after end of Investment period

--SELECT--

Add **Close**

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Activities Google Chrome ▾ Sat 1:06 PM Avallis | FIPA - Google Chrome x

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J New Profile MASTERS Welcome, Salim

Profile Search

Profile

Types of Application

Particulars

Financial Goals

Financial Info

- Dependant Needs
- Expected Funds Inflow and Outflow
- Contingency Planning
- Retirement Planning
- Life Insurance
- Investments**
- Properties
- Cash Assets

Financial Info Investments

Investment

Showing 1 to 1 of 1 entries

Investment Details*							
#	Ownership*	Types*	Name of FA/Broker/Security house	Analysis By Portfolio	Name of Institution	Der	De
1	<input type="checkbox"/>	Self	ILP	Avallis Financial Pte Ltd	Yes	HSBCAM - HSBC Globa	PAM-9

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Screen Name : Financial Info
Sub Item : Properties

Description:

1. It contains properties details for Ownership based on Self , Spouse or Joint.
2. If the data entered into the Annual Loan Repayment in CASH section , calculated data will be reflected into Cash Flow Statement.
3. If the data entered into the Annual Loan Repayment in CPF section of Self and Spouse, 2 new records will be added into CPF Addition and Deduction table in Central provident fund.
4. If Sold On is "No" and Rent on is "Yes" then add a record in Income and assets available for retirement in Retirement planning screen.

SCREENSHOTS:

#	Description*	Market Value (\$)*	Ownership*	Property Appreciation Rate (%)	Mortgage Outstanding (\$)	Outstanding Loan Period (yrs)	Objective
1	test	234	Self		234		Inv

Screen Name : Financial Info > Cash Assets

Sub Item : Cash At Bank

Description:

1. It contains Cash at bank details for Ownership type Self , Spouse or Joint and Main Account Holder Name.
2. Multiple entries of records.
3. If Objective is "Retirement" then add a record in Income and assets available for retirement in Retirement planning screen.

SCREENSHOTS:

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Cash At Banks

Main Account Holder Name	--SELECT--	Name Of Bank	
Supp. Account Holder Name		Bank Account No.	
Relationship	--SELECT--	Type of Account	--SELECT--
Ownership type	--SELECT--	Current Balance	\$
Regular Deposit		Objective	
Regular Deposit if any	\$	Objective	--SELECT--
Frequency of Deposit	--SELECT--	Remarks	
Period From (DD/MM/YYYY)			
Period To (DD/MM/YYYY)			

Add Close

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S1548996J

Financial Info Cash At Banks

Cash At Bank

Showing 1 to 1 of 1 entries

#	Main Account holder name	Supp. Account holder name	Relationship	Ownership	Name of bank	Bank Account N
1	Mohamed Salim Bin M	34	Aunt	Spouse	234	234

Screen Name : Financial Info > Cash Assets
Sub Item : Cash And Other Assets
Description:
Section I : Cash Assets
 1. Data entry screen of cash Assets for Self , Spouse and Joint.

SCREENSHOTS:

Activities Google Chrome ▾ Sat 1:24 PM Avallis | FIPA - Google Chrome x

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J New Profile MASTERS Welcome, Salim

Financial Info > **Cash & Other Assets**

Cash Assets

		% Use for Retirement Planning	Remarks	
Self	Savings and Fx deposits	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Cash equivalent & others	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	SRS a/c	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Total Cash Assets	\$ <input type="text"/>		

		% Use for Retirement Planning	Remarks	
Spouse	Savings and Fx deposits	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Cash equivalent & others	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	SRS a/c	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Total Cash Assets	\$ <input type="text"/>		

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Activities Google Chrome ▾ Sat 1:24 PM Avallis | FIPA - Google Chrome x

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J New Profile MASTERS Welcome, Salim

Financial Info > **Cash & Other Assets**

Spouse

		% Use for Retirement Planning	Remarks	
Spouse	Savings and Fx deposits	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Cash equivalent & others	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	SRS a/c	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Total Cash Assets	\$ <input type="text"/>		

Jointly

		% Use for Retirement Planning	Remarks	
Jointly	Savings and Fx deposits	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Cash equivalent & others	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	SRS a/c	\$ <input type="text"/>	<input type="text"/> %	<input type="text"/>
	Total Cash Assets	\$ <input type="text"/>		

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Section II : Other Assets

2. Data entry screen of cash Assets for Self , Spouse and Joint.

The screenshot shows a web-based application for financial planning. At the top, there's a navigation bar with 'Activities' and 'Google Chrome'. The title bar says 'Avallis | FIPA - Google Chrome' and shows the date 'Sat 1:25 PM'. A warning 'Not secure' is present. The main area has tabs for 'Financial Info' (selected) and 'Cash & Other Assets'. On the left, a sidebar lists categories like 'Profile Search', 'Profile', 'Types of Application', 'Particulars', 'Financial Goals', 'Financial Info' (selected), 'Dependant Needs', 'Expected Funds Inflow and Outflow', 'Contingency Planning', 'Retirement Planning', 'Life Insurance', 'Investments', 'Properties', and 'Cash Assets' (selected). The central part shows a table for 'Other Assets' with columns for 'Self(\$)', 'Spouse(\$)', 'Jointly(\$)', 'Loans(\$)', and 'Remarks'. Rows include 'Personal Items', 'Club Ownership', 'Business Ownership', 'Others Assets', and a summary row 'Total Other Assets'. Below the table is a 'Notes' section with a text input field containing 'Other Asset'. At the bottom, a footer states 'Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3'.

	Self(\$)	Spouse(\$)	Jointly(\$)	Loans(\$)	Remarks
Personal Items	<input type="text"/>				
Club Ownership	<input type="text"/>				
Business Ownership	<input type="text"/>				
Others Assets	<input type="text"/>				
Total Other Assets	<input type="text"/>				

Notes
Other Asset

Section III : Other Personal Assets

3. It contains Personal details for Account holder Self , Spouse or Joint.
4. Multiple entries of records.

SCREENSHOTS:

Activities Google Chrome ▾ Sat 1:26 PM Avallis | FIPA - Google Chrome

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FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Profile Search

Financial Info Cash & Other Assets

Personal Assets Details

Account Holder*	--SELECT--	Est. Appre. Val.	\$ <input type="text"/>
Types of Personal Assets*	<input type="text"/>	Yrs to Keep	<input type="text"/> yrs
Name of Asset*	<input type="text"/>	Preserved for Child's Edu. %	<input type="text"/> %
Purchase Value	\$ <input type="text"/>	% Preserved for Retirement Planning	<input type="text"/> %
Current Value	\$ <input type="text"/>	Remarks	<input type="text"/>
Outstanding Loan	\$ <input type="text"/>		

Add Close

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Activities Google Chrome ▾ Sat 1:27 PM Avallis | FIPA - Google Chrome

⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFCBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Profile Search

Financial Info Cash & Other Assets

Other Personal Assets

Showing 1 to 1 of 1 entries

#	<input type="checkbox"/>	Account Holder*	Types of Personal Assets*	Name of Asset*	Purchase Value(\$)	Current Value(\$)	Outstanding Loan(\$)	Estimate Appreception Value(\$)
1	<input type="checkbox"/>	Self	213	123	123	123	235	523

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Section IV : Business Assets

4. It contains Business details for Account holder Self , Spouse or Joint.
5. Multiple entries of records.

SCREENSHOTS:

Activities Google Chrome ▾ Sat 1:27 PM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Cash & Other Assets

Business Assets Details

Account Holder*	--SELECT--	Est. Appre. Val.	\$ <input type="text"/>
Types of Business Assets*		Yrs to Keep	<input type="text"/> yrs
Name of Business*		Preserved for Child's Edu. %	<input type="text"/> %
Investment Value	\$ <input type="text"/>	% Preserved for Retirement Planning	<input type="text"/> %
Current Value	\$ <input type="text"/>	Remarks	<input type="text"/>
Outstanding Loan	\$ <input type="text"/>		

Add Close

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Activities Google Chrome ▾ Sat 1:27 PM Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Cash & Other Assets

Business Assets

Show 1 to 1 of 1 entries

#	<input type="checkbox"/>	Account Holder*	Types of Business Assets*	Name of Business*	Investment Value(\$)	Current Value(\$)	Outstanding Loan(\$)	Estimate Appreciation Values
1	<input type="checkbox"/>	Joint	asd	asd	234	234	234	23

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Screen Name

: Financial Info

Sub Item

: Estate planning

DESCRIPTION:

1. Data Entry screen

SCREENSHOTS:

The screenshot shows the FIPA application running in Google Chrome. The title bar indicates it's a Google Chrome window from 192.168.1.11:8201/FIPA/Menu.do?l=00FCBC664518F68846A3D611C9BB7875. The main content area is titled 'Financial Info' under 'Estate Planning'. On the left is a sidebar with a tree view of financial planning categories. The main form contains four rows of questions with dropdown menus for 'Self' and 'Spouse' and a large 'Remarks' text area.

Question	Self	Spouse	Remarks
Have any Will or Trust been set up?	--SELECT--	--SELECT--	
Have any LPOA been set up?	--SELECT--	--SELECT--	
Do you intend to provide gift to charity	--SELECT--	--SELECT--	
Do you have any assets overseas	--SELECT--	--SELECT--	

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Screen Name : Financial Info
Sub Item : Central Provident Fund

DESCRIPTION:
SECTION I : CPF BALANCE

1. Data Entry screen for CPF Balance - Listing of label is fetched from Master CPF Screen.

SECTION II: CPF Annual Contribution

2. Fill the details upon clicking Fill button , data fetched from CPF Master contribution screen.

The screenshot shows the FIPA application interface for CPF Balance. At the top, it displays the client's name, NRIC/FIN No., and a 'Central Provident Fund' tab. On the left, a sidebar lists various financial categories like Profile Search, Profile, Types of Application, etc. The main area contains sections for Client (Ordinary, Special, Medisave, Retirement contributions) and Spouse (Ordinary, Special, Medisave, Retirement contributions). Below these are sections for CPF Annual Contribution (Client and Spouse) and a 'Fill' button. The bottom of the screen includes a footer with a link to CPF.gov.sg and copyright information.

SECTION III : CPF Account - Additions & Deductions of funds into CPF a/c

3. It contains Personal details for Account holder Self , Spouse or Joint.
4. Multiple entries of records.

SCREENSHOTS:

The screenshot shows the FIPA application interface for CPF Additions & Deduction Details. A modal dialog box is open in the center. It contains fields for Name of Account Holder (dropdown), Applicant Type (dropdown), Description of Transaction (dropdown), Types of Transaction (dropdown), Types Of CPF Account (dropdown), Period From and To (date pickers), Amount (text input), Frequency of Transaction (dropdown), and Amount to be transferred from OA to RA (dropdown). Buttons for 'Add' and 'Close' are at the bottom of the dialog. The background shows the same FIPA application interface as the previous screenshot.

Activities Google Chrome Sat 1:33 PM Avallis | FIPA - Google Chrome Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Central Provident Fund**

CPF Account - Additions & Deductions of funds into CPF a/c

Showing 1 to 1 of 1 entries

#	Name of Account Holder*	Applicant Type	Description of Transaction	Type of transaction*	Type of CPF Ac
1	Mohamed Salim Bin Mohd Amin	Self	Investment	Deduction	Ordinary

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Activities Google Chrome Sat 1:33 PM Avallis | FIPA - Google Chrome Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Central Provident Fund**

Central Provident Fund (Investment Summary)

Types of Investments

SELF		CPFOA(s)	CPFSA(s)	CPFRA(s)	SRS(s)	Total(s)
UTs(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
ILPs(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
Shares(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0

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Activities Google Chrome Sat 1:34 PM Avallis | FIPA - Google Chrome Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J

Profile Search **New Profile** **MASTERS** **Welcome, Salim**

Financial Info **Central Provident Fund**

	Regular(s)	0	0	0	0	0
ILPs(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
Shares(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
Bonds(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
Dividends(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0
Total(\$)	Current(s)	0	0	0	0	0
	Regular(s)	0	0	0	0	0

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Section – IV : CPF Projections

Content will be updated soon

Screen Name : Financial Info
Sub Item : SRS

DESCRIPTION:

1. SRS will display only the resultant calculation from Investment data. When Payment method is “SRS”, the summary analysis will calculated automatically and result will be generated in SRS screen.

SCREENSHOTS:

Types of Investments			
SELF		Cash(\$)	SRS(\$)
UTs(\$)	Current(\$)	0	0
	Regular(\$)	0	0
ILPs(\$)	Current(\$)	0	235382
	Regular(\$)	0	468
Shares(\$)	Current(\$)	0	0
	Regular(\$)	0	0
Bonds(\$)	Current(\$)	0	0
	Regular(\$)	0	0
Dividends(\$)	Current(\$)	0	0
	Regular(\$)	0	0

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Screen Name
: Financial Info
Sub Item
: Financial Liabilities
Description:

1. Data entry screen for self and spouse

SCREENSHOTS:

The screenshot shows a web-based application interface for financial planning. At the top, there's a navigation bar with 'Activities Google Chrome' and a timestamp 'Sat 1:38 PM'. Below it, the title 'Avallis | FIPA - Google Chrome' is displayed. A warning message '⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875' is present. The main content area has a header 'Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996J' and a user greeting 'Welcome, Salim'. On the left, a sidebar menu lists various sections: Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info (which is currently selected), Dependant Needs, Expected Funds Inflow and Outflow, Contingency Planning, Retirement Planning, Life Insurance, Investments, Properties, and Cash Assets. The main panel is titled 'Financial Liabilities' and contains a table for entering financial data. The table has two columns: 'SELF(\$)' and 'SPOUSE(\$)'. It includes rows for Overdraft, Short Term Loans, Credit Card Loans, Mortgage Loans (with a small icon of a house), Taxes, Other Liabilities (with a small icon of a person), Contingent liabilities, and a summary row for Total Liabilities. Each row has input fields for both the self and spouse amounts.

	SELF(\$)	SPOUSE(\$)
Overdraft	\$ [input]	\$ [input]
Short Term Loans	\$ [input]	\$ [input]
Credit Card Loans	\$ [input]	\$ [input]
Mortgage Loans	\$ [input]	\$ [input]
Taxes	\$ [input]	\$ [input]
Other Liabilities	\$ [input]	235
Contingent liabilities	\$ [input]	\$ [input]
Total Liabilities	\$ [input] 235	\$ [input]

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Screen Name
: Financial Info
Sub Item
: Current Assumption
Description:

1. Data entry screen for self and spouse

SCREENSHOTS:

The screenshot shows the FIPA (Financial Planning Application) interface. At the top, it displays "Activities Google Chrome" and the date "Sat 1:38 PM". The main title is "Avallis | FIPA - Google Chrome". A warning message "⚠ Not secure | 192.168.1.11:8201/FIPA/Menu.do?I=00CFBC664518F68846A3D611C9BB7875" is present. The header also includes "Client's Name: Mohamed Salim Bin Mohd Amin" and "NRIC / FIN No.: S1548996J". On the right, there are buttons for "New Profile", "MASTERS", and "Welcome, Salim".

The main content area is titled "Financial Info" and "Current Assumptions". It features three sections: "Self", "Spouse", and "Family". Each section contains input fields for "Average Investment rate (ROI)", "Projected ROI after retirement", "Current Inflation rate (General)", and "Current Inflation rate (Education)". Below these, there is a section titled "Assumed ROI" with input fields for "Savings deposit rate", "Bonds", "Unit Trust/LP", "Shares", and "Other Investments".

The left sidebar has a dark blue background and lists the following categories: Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info (which is highlighted in teal), Dependant Needs, Expected Funds Inflow and Outflow, Contingency Planning, Retirement Planning, Life Insurance, Investments, Properties, and Cash Assets.

At the bottom of the page, a green footer bar states: "Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3".

Screen Name : Financial Info
Sub Item : Other Areas of Concern
Description:

1. Multiple entries of records

SCREENSHOTS:

Sat 1:39 PM

Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Other Areas of Concerns

Showing 0 to 0 of 0 entries

Other Area Of Concerns

No data available

Add Close

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Sat 1:40 PM

Avallis | FIPA - Google Chrome

Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875

FIPA Financial Planning Application

Client's Name: Mohamed Salim Bin Mohd Amin NRIC / FIN No.: S154B996

New Profile MASTERS Welcome, Salim

Profile Search Profile Types of Application Particulars Financial Goals Financial Info Dependant Needs Expected Funds Inflow and Outflow Contingency Planning Retirement Planning Life Insurance Investments Properties Cash Assets

Financial Info Other Areas of Concerns

Showing 1 to 1 of 1 entries

#	Other Areas of Concerns*
1	testing

Add Close

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Screen Name

: Analysis Report

Description:

1. Analysis Report generated , based on single selected and multiple selection options is provided.
2. Upon clicking Generate Report , the selected report wil be generated on single shot.

SCREENSHOTS:

The screenshot shows the FIPA Analysis Report page. On the left, there's a sidebar with navigation links: Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info, Analysis Report (which is currently selected), Attachments, and eKYC. The main content area has a heading "Analysis Report" and a sub-instruction "To view reports, click the respective icon(s) and Generate Report". Below this are eight square icons, each representing a different type of analysis:

- Cash Flow Analysis (Icon: A banknote with a dollar sign)
- CPF Projections Analysis (Icon: A CPF card)
- Net Worth Analysis (Icon: A bar chart)
- Retirement Planning (Icon: An umbrella)
- Cash At Banks (Icon: A house with a dollar sign)
- Child Education (Icon: Children playing)
- Investments Details (Icon: A person with a briefcase)
- Summary of Insurance Policy (Icon: Stacks of money)
- Survival Needs Analysis - Self (Icon: Two people)
- Survival Needs Analysis - Spouse (Icon: Two people)

A "Generate Report" button is located in the top right corner of the main content area. At the bottom of the page, a footer bar displays the text "Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.6.1". The bottom of the screen shows a Windows taskbar with the search bar, pinned icons, and system status indicators.

Screen shots:
Cash Flow Analysis

frameset - Google Chrome
Not secure | 118.201.157.48:7093/birt-viewer/frameset

Cash Flow Analysis			
	Sources of Income		
	Self	Spouse	Joint
Employment	Monthly Net Income(OW) 20000	8,000.00	
	Annual profits/bonuses 40000	20000	
	Monthly income 2000		
Non Employment Income	Annual Int., dividends, gains 510		
	Annual rental income 1000		
	Others (annual)		
Total Annual Income	305510	116000	
Less Employee's Contributions	60000	24000	
Net Annual Inflow	245510	24000	
Annual Expenditure			
	Self	Spouse	Family
Rental for lodgings			
Utilities & communication	600	600	1000
Grocery & household needs			12000
Eating out	6000	4000	12000
Clothing & apparel	2000	4000	6000
Transportation	5000	3000	6000
Medical & personal care	1000	1000	2000
Personal expenses	5000	5000	
Household maintenance & conservancy	-N/A-	-N/A-	6000
Domestic Help	-N/A-	-N/A-	8400
Children care, education & enhancement prog.	-N/A-	-N/A-	

Windows Type here to search 10:17 AM 17-Jun-19

CPF:

frameset - Google Chrome
Not secure | 118.201.157.48:7093/birt-viewer/frameset

CPF Analysis																		
Ordinary						Special				Medisave								
Age	Beginning Balance	Annl. Contribution	Annl. Addition	Annl. Deduction	End Balance	Beginning Balance	Annl. Contribution	Annl. Addition	Annl. Deduction	End Balance	Beginning Balance	Annl. Contribution	Annl. Addition	Annl. Deduction	End Balance			
42	56,000	21,420	5,000	512	84,155	25,000	7,140	0	400	33,327	20,000	9,180	0	400	30,014			
43	84,155	21,420	5,000	512	113,014	33,327	7,140	0	400	42,070	30,014	9,180	0	400	40,346			
44	113,014	21,420	5,000	512	142,595	42,070	7,140	0	400	51,162	40,346	9,180	0	400	51,091			
45	142,595	21,420	5,000	512	172,915	51,162	9,811	0	400	65,684	51,091	9,180	0	400	57,200			
46	172,915	19,380	5,000	512	201,902	65,684	17,960	0	400	89,261	57,200	10,200	0	400	57,200			
47	201,902	19,380	5,000	512	231,614	89,261	17,960	0	400	113,782	57,200	10,200	0	400	57,200			
48	231,614	19,380	5,000	512	262,068	113,782	17,960	0	400	139,284	57,200	10,200	0	400	57,200			
49	262,068	19,380	5,000	512	293,424	139,284	17,960	0	400	165,806	57,200	10,200	0	400	57,200			
50	293,284	19,380	5,000	512	327,568	165,806	17,960	0	400	191,100	57,200	10,200	0	400	57,200			
51	327,568	25,610	5,000	512	369,096	191,100	11,730	0	400	210,927	57,200	10,710	0	400	57,200			
52	369,096	25,610	5,000	512	411,661	210,927	11,730	0	400	231,548	57,200	10,710	0	400	57,200			
53	411,661	25,610	5,000	512	455,290	231,548	11,730	0	400	252,993	57,200	10,710	0	400	57,200			
54	455,290	25,610	5,000	512	500,010	252,993	11,730	0	400	275,296	57,200	10,710	0	400	57,200			
Retirement				Ordinary				Special				Medisave						
Age	Beginning Balance	Annl. Addition	Annl. Deduction	End Balance	Beginning Balance	Annl. Contribution	Annl. Addition	Annl. Deduction	End Balance	Beginning Balance	Annl. Contribution	Annl. Addition	Annl. Deduction	End Balance				
55	176,000	0	176,000	500,010	25,610	5,000	512	543,361	99,296	11,730	0	400	115,051	57,200	10,710	0	400	57,200
56	176,000	0	176,000	543,361	22,550	5,000	512	584,658	115,051	3,570	0	400	122,950	57,200	10,710	0	400	57,200
57	176,000	0	176,000	584,658	22,550	5,000	512	626,988	122,950	3,570	0	400	131,164	57,200	10,710	0	400	57,200
58	176,000	0	176,000	626,988	22,550	5,000	512	670,376	131,164	3,570	0	400	139,708	57,200	10,710	0	400	57,200
59	176,000	0	176,000	670,376	22,550	5,000	512	714,849	139,708	3,570	0	400	148,593	57,200	10,710	0	400	57,200
60	176,000	0	176,000	714,849	0	5,000	512	737,320	148,593	0	0	400	154,121	57,200	0	0	400	57,200
61	176,000	0	176,000	737,320	0	5,000	512	760,353	154,121	0	0	400	159,869	57,200	0	0	400	57,200
62	176,000	0	176,000	760,353	0	5,000	512	783,961	159,869	0	0	400	165,848	57,200	0	0	400	57,200
63	176,000	0	176,000	783,961	0	5,000	512	808,160	165,848	0	0	400	172,066	57,200	0	0	400	57,200

Waiting for 118.201.157.48... Windows Type here to search 10:24 AM 17-Jun-19

Networth Analysis

frameset - Google Chrome
Not secure | 118.201.157.48:7093/birt-viewer/frameset

frameset 1 / 2

+ -

Networth Analysis

Your Assets							
	Self	Spouse	Jointly	Total	Liability	Net Worth	% of
Cash/Cash Equivalents							
Cash	51,250	0	0	0	60,210	-60,210	
SRS	10,000	0	0	10,000	0	10,000	
Investment Assets							
Insurance Cash Values	0	0	0	0	0	0	
Bonds	0	0	0	0	-N/A-	0	
Unit Trust , ILPs	0	0	0	0	-N/A-	0	
Shares	0	0	0	0	-N/A-	0	
Other Investments	0	0	0	0	-N/A-	0	
Investments Properties	42	0	0	42	110	-68	
CPF							
Ordinary	56,000	36,000	-N/A-	92,000	-N/A-	92,000	
Special	25,000	15,000	-N/A-	40,000	-N/A-	40,000	
Medisave	20,000	10,000	-N/A-	30,000	-N/A-	30,000	
Other Assets							
Vehicles	-N/A-	-N/A-	-N/A-	182,000	37,000	145,000	
Personal Property (Residential)	0	0	0	0	0	0	

Type here to search

10:30 AM 17-Jun-19

Child Education Planning:

Avallis | FIPA - Google Chrome
frameset - Google Chrome
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frameset

+ -

Child Education Planning Analysis

Child Education Profile

Name of Child	Jacob
Age of Child	13
Relationship	Son
Tertiary Age	21
Name of University	
Annual Education cost	0
No. of yrs of Studies	3
Inflation rate (education)	4

Projection of Cost of Education

Total Cost of Education	Inflation Factor	Total Cost of Education	Current Education Fund provided	Balance of Education Fund needed
0	X 1.67	= 0	- 5,000	= -5,000

Calculation of Funds to Accumulate

Based on	5%	6%	7%	8%
Annual	0	0	0	0
Lump Sum	0	0	0	0

Type here to search

10:31 AM 17-Jun-19

Investment:

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frameset 1 / 1 Download

Investment Details

Ownership	Investmt Type	Name of FA/ Broker/ Security Institution	Names of Institution	Description of Inv	Estimated Investment rate	Amt Invested	Source	Date Invested	Current Bid Pr/NAV	No of units	Frequency	Regular inv amt	No of yrs of regular inv	Total no of Yrs to stay invested	Objective	Name of child the inv is provided for	% of accum to serve obj	Remark
Self	Bonds	Avallis Financial Pte Ltd	Aberdeen	ABEAHYF	10	20000		13/11/2018	1.1327	200	SEMI ANNUAL	5000	10	0	Education Planning		0	
Self	ILP	Avallis Financial Pte Ltd	AAAM	ABNEEESGD	6	0		08/02/2019	0	0		0	0	0			0	
Self	Bonds	Avallis Financial Pte Ltd			4	0	CPFMA	01/05/2019	2.5	2000		0	0	0	Retirement Planning		10	
Self	Bonds	Avallis Financial Pte Ltd	AIM-1		4	1250	Cash	14/08/2018	2.5	200		0	0	0	Retirement Planning		10	
Self	Bonds	Avallis Financial Pte Ltd			4	0	CPFOA	28/05/2019	2.5	2000		0	0	0			0	

Type here to search 10:32 AM ENG 17-Jun-19

SNA – Self

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frameset 1 / 2 Download

Survival Needs Analysis - Self

1. Estate Needs

A Capital Needs at Death

Inflation Rate	2.00	
Investment Rate (family)	3.00	
Effective Rate	0.98	
Capital Needs for	Ann fin. needs	Commutd Amt Needed
Personal	-N/A-	-N/A-
Spouse	600	0
Children	24,000	0
Family	50,000	0
Dependants	8,400	101,268
Total Capital Needs	83,000	101,268

B Immediate Cash Needs at Death

Overdrafts	5,000
Short Term Loans	3,000
Credit Card Loans	2,000
Taxes	15,000
Last Expenses	20,000
Vehicle Loan	37,000
Mortgage Loan	110
Other Liabilities	5,100
Children Education Funds	20,000
Total Immediate Cash Needs	107,210

Total Estate Needs [A+B] 208,478

C Available Assets

Type here to search 10:32 AM ENG 17-Jun-19

Screen Name

: Attachments

Description:

1. Attachment can be upload into FIPA it contains Attachment Categories like COMPLIANCE, FEEDBACK, FINANCIAL PLANNING, INVESTMENT, KYC, NEW BUSINESS, NON FPF/EXISTING POLICY, SERVICING, UNDERWRITING.
2. Based on Category selection, document title will be listed. These listing is taken from FPMS.

SCREENSHOTS:

The screenshot shows a web browser window for the Avallis | FIPA - Google Chrome application. The URL is 192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875. The page title is "Attachments". The left sidebar menu includes "Profile Search", "Profile", "Types of Application", "Particulars", "Financial Goals", "Financial Info", "Analysis Report", "Attachments" (which is selected), "Summary", "Declaration", and "Supervisor's Review". The main content area displays a table with one entry:

	Category*	Document Title*	Upload Document*	No.of Pages	File Type	Remarks
<input type="checkbox"/>	INVESTMENT	--SELECT--	<input type="button" value="Choose file"/> No f...sen	<input type="text"/>	<input type="text"/>	<input type="text"/>

At the bottom of the page, a footer bar states: "Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3".

MASTER SCREEN:

1. Upon click Master screen option on top of the screen CPD ACCOUNT TYPES ,CPF CONTRIBUTION RATES,CPF RETIREMENT SUM,CPF LIFE PAYOUT INCOME, QUOTES.

2. These are Master entries , only the Staff can do entries. Others can only able to view or seach any records.

The screenshot shows the FIPA application interface. On the left, there is a vertical navigation menu with options like Profile Search, Profile, Types of Application, Particulars, Financial Goals, Financial Info, Analysis Report, Attachments, Summary, Declaration, and Supervisor's Review (which is currently selected). The main content area has a header "Supervisor's Review". Below it, there is a section for "Signature of Representative" with fields for "Signature of Representative" and "(Name of Representative) (DD/MM/YYYY)". To the right of this is a sidebar with links to "CPF Account Types", "CPF Contribution Rates", "CPF Retirement Sum", "CPF Life Pay Out Income", and "Quotes". At the bottom of the page, a footer bar displays the text "Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3" and the URL "192.168.1.11:8201/FIPA/Menu.do?l=00CFBC664518F68846A3D611C9BB7875".

Master CPF Account types:

The screenshot shows the "Master CPF Account Types" screen. At the top, there is a search bar with "Search Criteria" and a dropdown for "CPF Account" with the option "--SELECT--". Below this is a table titled "CPF Account Details" showing three rows of data. The columns are labeled "#", "Select", "Account Type*", "Code", "Commencement Age(yrs)", "Withdraw Age(yrs)", and "Top-up Limit(\$)". The data is as follows:

#	Select	Account Type*	Code	Commencement Age(yrs)	Withdraw Age(yrs)	Top-up Limit(\$)
1	<input type="checkbox"/>	Ordinary	OA	1	1	
2	<input type="checkbox"/>	Special	SA			
3	<input type="checkbox"/>	Medisave	MA			

At the bottom of the screen, a footer bar displays the text "Business system developed and maintained by Avallis Financial Pte Ltd (Singapore). All rights reserved | Ver : UAT - 19.5.3" and the URL "192.168.1.11:8201/FIPA/Menu.do?l=EDD23EE94AF6A4C5783089455466F387".

Master CPF Contribution rates:

Activities Google Chrome ▾ Sat 1:52 PM Avallis | FIPA - Google Chrome

① Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=EDD23EE94AF6A4C5783089455466F387

FIPA

Master Contribution Rates

Search Criteria Effective From (DD/MM/YYYY) Employee Age Group Employee Wage Group Search

CPF Contribution Rates

Showing 0 to 0 of 0 entries

#	Select	Effective From(DD/MM/YYYY)	Effective To(DD/MM/YYYY)	Employee Age Group	Employee's Total Wage Group	Base Value(%)	Base On	Bonus value(%)	E
No data available in table									

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Master CPF Retirement Sum

Activities Google Chrome ▾ Sat 1:53 PM Avallis | FIPA - Google Chrome

① Not secure | 192.168.1.11:8201/FIPA/Menu.do?l=EDD23EE94AF6A4C5783089455466F387

FIPA

Master CPF Retirement Sum

Search Criteria Year * 2019 yrs Search

Retirement Sum

Year * 2019 yrs BRS * \$ 88000 FRS \$ 176000 ERS \$ 264000 Clear

Basic Health Care Sum (BHC) \$ 57200

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Master CPF Life Payout Income for Year

Activities Google Chrome ▾ Sat 1:53 PM Avallis | FIPA - Google Chrome x

① Not secure | 192.168.1.11:8201/FIPA/NewProfile.do

FIPA Client's Name: NRIC / FIN No.: New Profile MASTERS ▾ Welcome, Salim ▾ Close

CPF Life Pay Out Income for year

Search Criteria Retirement Sum --SELECT-- Search

CPF Life Pay Out Income for year

Showing 1 to 3 of 3 entries

#	Select	Retirement Sum	Pay out year(ys)	Monthly(\$)	Annually(\$)
1	<input type="checkbox"/>	BRS	2019	730	8760
2	<input type="checkbox"/>	ERS	2019	1960	23520
3	<input type="checkbox"/>	FRS	2019	1350	16200

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Master Quotes

Activities Google Chrome ▾ Sat 1:53 PM Avallis | FIPA - Google Chrome x

① Not secure | 192.168.1.11:8201/FIPA/NewProfile.do

FIPA Client's Name: NRIC / FIN No.: New Profile MASTERS ▾ Welcome, Salim ▾ Close

Master Quotes Save

Showing 1 to 15 of 15 entries

#	Select	Author	Login Message
1	<input type="checkbox"/>	Warren Buffett	In the business world, the rearview mirror is always clearer than the windshield.
2	<input type="checkbox"/>	Warren Buffett	We simply attempt to be fearful when others are greedy and to be greedy only when others are fearful.
3	<input type="checkbox"/>	Warren Buffett	Someones sitting in the shade today because someone planted a tree a long time ago.
4	<input type="checkbox"/>	Warren Buffett	Rule No.1: Never lose money. Rule No.2: Never forget rule No.1.
5	<input type="checkbox"/>	Warren Buffett	I never attempt to make money on the stock market. I buy on the assumption that they could close the market the ne

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Features:

FPMS Login credentials to access applications

FPMS Client Details are fetch over here.

FPMS Policy (Inforce & Renewal)are fetch over here

Row based screens edit and delete operation are handled based on row selection (DHTML CRUD icons)

Attachment upload & download.

RP-CF Analysis Section – Export to PDF document

Graphical representation(Charts) for RP-CF Analysis

For Investment Details, Fund Manager, Funds and NAV prices are fetch over here.

Data synchronization between FIPA screens (retirement planning, CPF statement, Cash flow statements).

Report Single selection , combined selection & generation. Upon combined selection auto download option.

FPMS - eKYC generation through FIPA.