Conquest Planning FAQ

1. What is Conquest Planning?

Conquest Planning was founded in 2018 and based in Winnipeg, Manitoba. Conquest specializes in modern financial planning software within the financial services industry.

Their main offerings include a planning engine that utilizes artificial intelligence to provide real-time, collaborative financial advice, and tools for both advisors and clients to dynamically adjust financial plans. They primarily serve financial institutions looking to enhance their financial advice delivery with technology.

2. What is a basic plan vs. an advanced plan?

The *standard plan* is defined as a client financial plan with access to investment and insurance planning features for individual and joint accounts.

The *advanced plan* is defined as a financial plan for a private corporation or detailed estate trust planning (family, charitable, inter vivos/testamentary) excluding legacy goal planning included within a standard plan.

3. What is SAM?

Conquest delivers state-of-the-art, client-centric and strategy-driven approach to solving client goals. SAM (Strategic Advice Manager) is the built-in intelligent assistant proposes strategies based on the client's specific circumstances and preferences. It leverages client demographics & data, client sentiment and best practices to provide and display the next best financial decision.

4. What is a Digital Story?

A Digital Story is a dynamic document that can be used to present a completed financial strategy to your client. These interactive pages allow you to review and share a detailed breakdown of strategies you are adopting on behalf of your client to ensure they meet their goals. Please refer to Conquest's video tutorial (in the Conquest University section of the platform) for more information. Digital Story is one of many tools and features that are included in every plan that you create.

5. Can I manually create a client's plan?

Yes, Conquest Planning is a powerful platform that gives you the flexibility to work with data in many ways. You can use the AI capabilities, develop plans manually or incorporate a bit of both into your client's solution for a customized, hybrid approach.

6. What is the volatility analysis feature?

This feature is available for advanced plans only. Conquest has partnered with Ortec Finance to provide you with an advanced stress test when preparing your client's financial plan. It assesses how sensitive the plan is to return rate volatility. Volatility analysis runs the plan from beginning to end 1000x by varying returns each year along the way as part of a realistic market simulation. This tool allows you to better predict outcomes when various scenarios occur.

Date of last review: May 2, 2024

7. What is the Conquest Client Portal?

The Client Portal is an option available for your clients and their access is initiated by you. It allows you and your clients to monitor their financial plan.

8. Can I customize the Conquest experience to match my advisor firm branding?

Yes, this can be accommodated. Conquest will allow customization for some aspects. A fee may apply.

PRICING

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9. How much does Conquest cost?

*Minimum purchase of $ 500.00
Standard Plans: $25
Advanced Plans: $50

Packages	Price
Bronze	$ 500.00
Silver	$ 1,000.00
Gold	$ 1,500.00
Platinum	$ 2,000.00
Platinum PLUS	$ 2,500.00

10. Are there any cost considerations to add additional people/users from my advisor team?

No, prices are based on annual prepayment and the number of plans created/accessed. There is no licensing cost per user.

11. How will I be billed for the prepayment?

The annual nonrefundable prepayment will be deducted from your remuneration in a single lump sum. At the end of each prepayment year, the total number of plans initiated, or prior year plans accessed, will be calculated.

12. What happens if I take no action at the end of my agreement year?

The prepayment amount and payment method selected will be carried over and charged annually on each automatic renewal date.

13. Are the Conquest plans refundable?

Conquest plans are non-refundable. Once an agreement is signed, the expectation is that the terms and conditions of the commitment are fulfilled, irrespective of your usage or cancellation requests.

ENROLLMENT

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14. How do I sign up for Conquest?

Conquest Planning Software Request Form

NOTE: Once you've submitted the request form, it can take 48 to 72 hours before access is granted.

15. How can I try Conquest?

Conquest Planning Software Request Form

16. How can I enroll my administrative team?

Conquest Planning Software Request Form

17. How do I cancel my account?

Conquest Planning Software Request Form

TRAINING

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18. How can I receive training on how to use Conquest?

Conquest has a robust, built-in self-serve knowledge base within the application. This is accessible via the main landing page, top left corner "Support & Resources".

1. **Start here:** Four-part series exploring one client's financial picture from start to finish.
2. **What's new?** Explore the latest features, including videos and notes from previous releases.
3. **Conquest University:** Pre-recorded training sessions.
4. **Videos:** A library of feature videos.
5. **SAM (Strategic Advice Manager):** A digital co-planning assistant with built-in artificial intelligence.
   *Tip: Look for the blue circle icon on the bottom right corner of the screen.

PLAN FEATURES

Plan Features	Standard	Advanced
User authentication / Self-registration	√	√
Light financial plan creation	√	√
Data gathering	√	√
Simple plan analysis	√	√
Retirement goals	√	√
Display next best financial decision (Client Strategies)	√	√
View/send client PDF reports	√	√√
Complex financial plan creation and confirmation	√	
Implement next best financial decision (Advisor & Client)	√	√
Education, major expense, cash reserve, and legacy goals	√	√
Rental properties	√	√
What-if scenario modelling	√	√
Advisor/Client digital collaboration	√	√

Plan implementation and advisor/client task list generation	√	√
Progress tracking	√	√
View/send detailed reports through multi page PDFs and digital stories	√	√
Simple stochastic modelling (e.g., sequence of returns)	√	√
Ability to design client output	√	√
Create multiple plan alternatives	√	√
Confirm action plan	√	√
Access to planning expert model (all strategies except Advanced)	√	√
Disability planning	√	√
Estate planning	√	√
Advanced estate planning		√
Volatility analysis		√
Private Corporations		√

ADVISOR SUPPORT – CONTACT INFORMATION

From Monday to Friday, 9:00 a.m. to 7:00 p.m. ET.

1. **Virtual meetings**
   - Book a meeting: https://calendly.com/conquest-advisor-support
   - Meetings are hosted using Microsoft Teams.

2. **Email**
   - Conquest Advisor Support: advisorsupport@conquestplanning.com

3. **Phone**
   - Toll-free number: 1-888-282-7020