What's in Pathways 6.7 Release?

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We're pleased to share the highlights of our latest Pathways product release

What's New in Version 6.7

Enhanced Client Review Process
Initiating and managing the reviews of client holding has been modified to incorporate customer feedback, this includes a new table to compare the previous review to the current review and additional report content and formatting.

Flexible Growth Rate Settings
Switch seamlessly between actuarial, stochastic, and custom growth rates for individual holdings, right from the settings tab.

Cashflow Retirement Module Enhancements
Shortfall outcome now included in the final report for a comprehensive retirement planning overview. **User Experience Upgrades**, enjoy a smoother, more intuitive interface. **Improved Conversion to Illustration**, Compliance is easier with the new sequence for customer segment information in illustrations.

Network Edition Special Features
Special Deal Override, Assignment, and Publishing, directly manage deals and publish them to named firms within the Network Edition.
These updates are designed to make your financial management smoother, more precise, and in line with regulatory compliance.

For further details on the enhancements and updates, see release notes and video below:

Synaptic Pathways 6.7 Release Notes.pdf

Your browser does not support HTML5 video.

Should you have any queries before or after this update, please talk to our support team on 0808 164 5463.