

Financial Planning Technology

About New Frontier Advisors

New Frontier Advisors is a global leader in the field of portfolio optimization and asset allocation. NFA provides custom investment advisory solutions as well as portfolio optimization and financial planning technology to many globally recognized consulting firms, investment management firms, and investment organizations. NFA provides innovative solutions for creating more effectively risk-managed portfolios.

Description

LifeCycle, New Frontier's financial planning technology, helps the investor determine the most suitable level of risk for given objectives. It is based on NFA's extensive research into the theory and practice of investment over time. LifeCycle considers the investor's portfolio value, proposed investment program—contributions, withdrawals, and time horizon—to estimate the likelihood of achieving one or several wealth or annuity goals. It is realistic, analytic, and graphic. LifeCycle allows an advisor and investor to quickly and interactively explore many what-if scenarios within available portfolio choices.

Additional Features

- compliant with contemporary financial theory (Samuelson & Merton)
- analytically superior to leading technologies
- targets terminal wealth or annuity
- highly compute-efficient
- customizable to different investment scenarios
- fixed and proportional cash flows, even multi-generational flows
- considers the impact of downside risk events
- inflation and fee handling
- flexible reporting options
- customizable charts and graphs

Considerations

LifeCycle is an enterprise-wide technology solution, appropriate for integration into existing platforms or as a stand-alone application. LifeCycle requires estimates of portfolio risk and return as inputs.

New Frontier Consulting Services can provide estimates of portfolio risk and return, customize additional applications, and implement advanced training. New Frontier Investment Advisory Services constructs model optimal portfolios. The Asset Allocation Suite is also available for preparing optimal portfolios and estimating risk and return.

LifeCycle can be used in a variety of computer formats, including Microsoft Excel, web service, and a customizable Applications Programming Interface.

Fees

New Frontier Enterprise-wide Technology Solutions are offered for a per-user fee.