What's new on North's Interactive Feature

As of 28 July 2025, North has introduced a new wave of enhancements to North Interactive. Designed to help you deliver more targeted, efficient, and engaging client reviews. These updates are now available in North to support your client advice conversations.

What's news?

Target Annual Return now available
You can now capture and track the performance of the Target Annual Return objective you have agreed with your client. The new Target Annual Return (TAR) features, provides allows you to:

o   Capture the target annual return objective you have agreed with your client
o   Display the objective' line on the Performance slide chart and historical returns table. with the TAR line plotted directly on the performance graph,
o   Facilitate more meaningful, goal-oriented discussions during reviews.

Alongside the Target Annual Return feature, we've introduced several North Interactive enhancements:

o   **Current holdings** – The Investment report section now defaults to show current holdings only, focusing the review on what's active in the portfolio, however, still providing flexibility to include past holdings.
o   **Delete consolidated groups** – Today you can create consolidated groups to view combined portfolio data across accounts and clients, we've introduced the ability to further maintain them by having the ability to delete a consolidated group.
o   **Contribution graph insights** – new hover-over information in the Contributions report section, making it easier to view contribution types and totals, at a glance.
o   **Graph visuals** – Legends in the Performance and Value over time report sections have been refined for better alignment and readability, and date labels on graphs have been simplified
o   **Beneficiary and Insurance** – we no longer display these details for closed accounts, helping you present more relevant streamlined reports.

These enhancements are designed to help you save time and deliver more focused, goal-driven client conversations.

For more information on North Interactive, click here or you can watch a demonstration video here.