

CrestCast for financial advisers

Last reviewed 01/10/2026. Questions: hello@crestcast.co.uk

WHAT IT IS

- A web app that forecasts a UK household's cashflow, net worth and debt up to ten years ahead, day by day, month by month or year by year, from the figures the household enters.
- UK tax built in: income tax including the Scottish bands, National Insurance, and student loan plans 1, 2, 4, 5 and Postgrad.
- No bank connection. Every figure traces back to something the household typed.
- For couples, each partner's own money and the joint items, added up into one household view.

THE ADVISER ACCOUNT

- Free for an adviser, on request at crestcast.co.uk/advisers. A person sets it up and replies by email.
- Viewing a forecast a client has shared needs no subscription.

HOW A CLIENT SHARES WITH YOU

- The client invites you by email from Settings > Share with an adviser. You accept in your own account.
- You see the client's own figures and forecast. You do not see anything their partner entered.
- By default the adviser can only view: the database lets them read and refuses every write.
- The client can switch on Can edit for a named adviser. Each change is recorded in the client's change history under your email.
- The client can switch it off, or stop sharing, at any time, with immediate effect.

A FACT-FIND FROM THE CLIENT

- In Settings, **Export my inputs** gives the client everything they have entered as one Excel file to send to you.
- The client runs it; exports are refused while an adviser is viewing a client.

WHAT A CLIENT PAYS

- 30 days free, no card. Then £7.99 a month or £79.99 a year for the whole household.

WHAT IT IS NOT

- A forecasting and planning tool, not regulated financial advice. It makes no recommendations and does not hold, move or invest money.
- It stops at ten years and does not plan retirement income or inheritance tax.

NEXT

- Request the account: crestcast.co.uk/advisers
- Explore the sample household, no account needed: crestcast.app/?demo=1
- For a compliance file: crestcast.co.uk/advisers/due-diligence