VisiPlan Workshop Descriptions

The following workshops are available in Victoria, NSW and Queensland. Agendas may vary between states.

New User – Admin

Who is this course for?

New users of VisiPlan.

Course objectives

Gain an overview of VisiPlan and the main modules used by an administrator or client services manager. These include, Fact Find, Portfolio Manager, Report Manager and Word Writer.

Portfolio Manager & Insurance

Who is this course for?

Existing VisiPlan users who use Portfolio Manager and the Insurance module in providing advice to clients.

Learning outcomes

At the completion of the course, participants will be able to:

- Enter and manage clients' existing and proposed investment products. This includes generating distributions and entering regular transactions.
- Manage the products database, create new products and use model portfolios.
- Use the Insurance module, work through a needs analysis and compare products using Risk Researcher.

Report Manager

Who is this course for?

Existing VisiPlan users who want to use Report Manager to modify or build their own reports.

Learning outcomes

At the completion of the course, participants will be able to:

- Use Report Manager to create and format basic reports. This includes extracting information from the VisiPlan database to construct a report and format it to include logos and disclaimers.
- Add filters to reports in order to 'data mine' the database.
- Use Mail Merge and Batch Reporting.

Word Writer

Who is this course for?

Existing VisiPlan users who want to understand and use Word Writer and Excel Writer to code documents.

Learning outcomes

At the completion of the course, participants will be able to:

- Code a Word Writer template using the Code Generator.
- Set up a Word-based directory.
- Code information within Excel Writer.
- Import VisiModelPlan and VisiTools scenario information.

VisiModelPlan – Strategies

Who is this course for?

Advisers and paraplanners.

Pre requisite

This workshop is for people who have attended the Visitools/ VisiSnapShot Plus workshops.

This course models case studies in VisiModelPlan, with a focus on retirement planning.

Retirement scenario: Planning and saving for retirement

Models a scenario for a couple in their 40s who have a home loan they wish to pay off and who are trying to ensure they will have enough for retirement.

This scenario explores:

- setting up and sale of share investments.
- automatic surplus allocation to pay off home loan.
- concessional (salary sacrifice and SG contributions) and non-concessional contributions.
- government co-contribution.
- super splitting.
- superannuation pensions in retirement.

Retirement scenario: Transition to retirement

Models a scenario for a couple in their 50s who are approaching and then entering retirement and wish to ensure their funds will last until the remainder of their lifetime.

This scenario explores:

- concessional contributions (salary sacrifice).
- spouse contributions.
- cash out and re-contribution for under 60yo.
- transition to retirement pension.
- lump sum withdrawal from superannuation.
- setting up of new superannuation pensions.
- age pension examination.

Investment scenario: Investing using investment property

Models a scenario for a couple who are accumulating wealth by purchasing an investment property by borrowing against their current principal residence.

This scenario explores:

- setting up a home loan.
- investment property and investment loan.
- automatic surplus allocation to repay home loan.
- non concessional superannuation contributions.
- sale of investment property.
- repayment of loan
- examination of tax, cash flow and asset balance consequences.

Visitools and VisiSnapShot Plus

Who is this course for?

Advisers and paraplanners.

Learning outcomes

At the completion of the course, participants will be able to:

- Use and understand the calculators available in Visitools.
- Use VisiSnapShotPlus and in particular be able to:
  - Use Solve functionality.
  - Understand implications and reading projections and cashflows.
  - Examine tax and Centrelink pages.
- Navigate VisiModelplan.

Practice Management

Who is this course for?

- Businesses who subscribe to the Practice Management module.
- Principals and administrative staff from these businesses who wish to understand the functionalities within the Practice Management module.

Learning outcomes

At the completion of the course, participants will be able to:

- Define Process Management parameters.
- Create Key Performance Indicators (KPI's).
- Create users.
- Manage document administration.
- Create Business Process Map flowcharts.
- Set KPI Targets.
- Create custom KPIs.
- Create Practice and Performance Management reports.
- Allocate automated processes to clients.
- Store and retrieve files in VisiPlan.
- Have an understanding of how to work with Ad Hoc and Process driven activities, to create custom fields and views.

For information about these workshops and their availability in your state, please contact your VisiPlan Account Executive or email Visiplan training at visiplantraining@iress.com.au.

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