WealthSolver
Supplementary Session

What is this session about?

This session is aimed at providing participants with knowledge and experience of the WealthSolver module, a superannuation, pension and investment comparison tool within XPLAN. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios.
This session provides an in-depth understand how the XPLAN software and WealthSolver fits within the advice journey, enabling participants to effectively research, compare and provide recommendations to clients on investment and retirement funding products.

Who should attend this session?

- Financial Planners and Paraplanners wishing to know how to search and compare superannuation, pension and investment products and merge the results into a Limited SOA from the module.

Pre-Requisite

- Completion of an XPLAN New User session.
- Good knowledge of Financial Planning concepts

Time

Half Day

Learning Outcome

After completing this session, participants will be able to:

- Enter client details into the Client Focus module specifically superannuation details.
- Enter client details into the WealthSolver module specifically superannuation, and investment details.
- Search for information relating to over 1000 Superannuation Plans, Pension and Investment Plans.
- Confidently compare Superannuation, Pension and Investments Funds against one another.
- Create a proposal for a rollover of balances from one/many Superannuation Plans.
- Create a proposal for a Self-Managed Super Fund (SMSF).
- Create a like-for-like comparison for existing superannuation plans.
- Create a proposal for Investments.
- Merge a Limited Statement of Advice (SOA) using a wizard with Superannuation, Investment recommendations

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New Zealand,
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United Kingdom

- Use WealthSolver coding to generate tables and charts

How do I register for this session?	Contact your Account Executive or view the XPLAN Training Listing on our website.

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