XTOOLS+ Wealth Creation Supplementary Session

What is this session about?	Welcome to the half day XTOOLS+ Wealth Creation session. This session is aimed at providing participants with knowledge and experience of the XTOOLS+ module, a detailed cashflow modelling calculator within XPLAN. This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios. This session provides an in-depth understand how the XPLAN software and XTOOLS+ fits within the advice journey, enabling participants to effectively project and analyse various strategies for clients.
Who should attend this session?	Financial Planners or Paraplanners who want to model a client's full financial position from wealth accumulation through to life expectancy.
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:
	• Navigate XTOOLS+ and complete data entry
	• Use XTOOLS+ to:
	    o Analyse a client's objectives
	    o Take into account a client's cashflow, assets and liabilities
	    o Model financial planning strategies across multiple life changes
	• Merge a Limited SOA using a wizard with strategy recommendations.

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

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