Risk Researcher Supplementary Session

What is this session about?

This session is aimed at providing participants with knowledge and experience of the Risk Researcher module, a fully interactive insurance comparison tool that provides both qualitative and quantitative analysis for personal risk insurance products 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 Risk Researcher fits within the advice journey, enabling participants to effectively research, compare and provide recommendations to clients on personal insurance products.

Who should attend this session?

- Financial Planners
- Paraplanners

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 should be able to:

- Enter client details into Client Focus
- Use the Needs Analysis calculator to calculate the level of insurance your client needs
- Use Risk Researcher to provide insurance advice
- Use the various Research Tools available to recommend an appropriate product
- Implement your recommended Product

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- Merge a Limited Statement of Advice (SOA) using a wizard with insurance 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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