

XTOOLS & Engage

Supplementary Session

What is this session about?

This session is aimed at providing participants with knowledge and experience of the module XTOOLS and Engage. XTOOLS; a suite of single strategy cashflow modelling calculators and Engage; a suite of graphical interface modelling calculators used to perform and illustrate single strategy projections within XPLAN. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios.

This session provides an in-depth understanding of how the XPLAN software and XTOOLS and Engage fits within the advice journey, enabling participants to effectively project and analysis various strategies for clients.

Who should attend this session?

- Financial Planners who want to model basic strategies and generate a quick projection of the client's financial position or engage with the client using these.
- Paraplanners who want to use the modelling functions and calculators in XTOOLS and Engage.

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:

- Using Engage to:
 - Analyse the effect of super consolidation;
 - Project a client's retirement planning;
 - Take into account a client's cash flow, assets and liabilities
- Using XTOOLS to:
 - Analyse a client's lifestyle goals;
 - Consolidate multiple debts into a single debt;

- Determine adequate savings to fund education expenses;
- Analyse social security entitlements;
- Take into account a client's cash flow, assets and liabilities.

How do I register for this session?

Contact your Account Executive or view the XPLAN Training Listing on our website.

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