Model Office Wizards Supplementary Session

What is this session about?

Model Office is a suite of advice templates, workflow processes and customised reports which can be used 'out of the box' or customised to your business. This session is aimed at providing participants with knowledge and experience of Model Office Wizards. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios.

Model Office is an IRESS offering which your practice or dealer group can choose to subscribe to. You may wish to speak to your licensee before attending this session.

Who should attend this session?

- Financial Planners, Paraplanners and Administration staff wanting to utilise Model Office to assist in the production of Statements of Advice, Records of Advice and Client Reviews.

Pre Requisite

- Completion of an XPLAN New User session.
- Good knowledge of Financial Planning concepts.
- Ability to use the relevant advice modules; Portfolios (IPS), Risk Researcher, WealthSolver and XTOOLS+

Time

- Half day

Learning Outcome

After completing this session, participants will be able to:

- produce a comprehensive SOA using the Model Office SOA wizard.
- produce a review document using the Review wizard.
- produce a Record of Advice Document using the ROA wizard.

How do I register for this session?

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

IRESS Limited,
Level 16, 385 Bourke Street
Melbourne, Victoria 3000

T +61 (0)3 9018 5800
F +61 (0)3 9018 5844
enquiries@iress.com.au
www.iress.com.au

Offices in:
Australia, Canada,
New Zealand,
Singapore, South Africa,
United Kingdom.