IRESS Portfolio System Supplementary Session

What is this session about?

Welcome to the half day IPS session. This session is aimed at providing participants with knowledge and experience of the IRESS Portfolio System, used to manage, report and provide recommendations on a client's portfolio 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 IRESS Portfolio System fits within the advice journey, enabling participants to effectively run investment reporting, create, maintain and model recommendations for a client.

Who should attend this session?

- Financial Planners and Para planners.

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 IPS
- Create and manage an existing portfolio
- Understand Portfolio Accounts, Datafeeds and Corporate Actions
- Redeem and recommend investments
- Use a SOA Wizard to generate a limited SOA
- Run Portfolio reports and bulk reporting
- Search Portfolio data

How do I register for this session?

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

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