

# XTOOLS+ Retiree: Strategies for preparing for aged care

**What is this session about?** This session aims to provide advisers and paraplanners with the knowledge to model various strategies using XTOOLS+.

The focus is on using XTOOLS+ to model strategies to help a retiree meet her financial goal of having adequate funds to move into residential aged care.

**Who should attend this session?** XPLAN users who model strategy recommendations using the XTOOLS+ CALM module

**Prerequisites:**

- Completion of an XPLAN New User Course.
- Intermediate knowledge of XTOOLS+ use.
- Good Knowledge of Financial Planning Concepts.

**Recommended Pre Learning**

XTOOLS + Wealth Creation classroom session or [video recording](#)

**Time**

Webinar is 1 hour. Classroom is half day. Content is the same.

**Learning Outcome**

After completing this session, participants should be able to:

- Use the XTOOLS Aged Care calculator and XTOOLS+ CALM to model aged care strategies in keeping / renting / selling the family home
- Model selling the residential home and making a downsizer contribution up to the limit into pension.
- Model investing surplus cashflow into an Annuity with an Insurance component for estate purposes.

**How do I register for this session?**

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