XTOOLS+ Entities Supplementary Session

What is this session about?

Welcome to the half day XTOOLS+ Entities session. This session is aimed at providing participants with knowledge and experience of the XTOOLS+ module, a detailed cashflow modelling calculator within XPLAN. This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios.

This session provides an in-depth understand how the XPLAN software and XTOOLS+ fits within the advice journey, enabling participants to effectively project and analyse various strategies for clients, SMSFs, a Company, and Trusts.

Who should attend this session?

Financial Planners or Paraplanners who want to model a client's full financial position from wealth accumulation through to life expectancy.

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:

- Create / add SMSF, Company and Trust into CALM
- Model multiple strategies relevant to these entities into CALM
- Project the full financial position for the Entity Group
- Merge a Limited SOA using a wizard with strategy 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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