

# Model Office Wizards

## Course description

Xplan 2021



**What is this course 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 course 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 course.

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**Who should attend this course?**

- Advisers, Paraplanners and Administrators wanting to utilise Model Office to assist in the production of Statements of Advice, Records of Advice and Client Reviews.

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**Pre-Requisite**

- Completion of an Xplan New User course.
- Good knowledge of Financial Planning concepts.
- Ability to use the relevant advice modules; Portfolio, Risk Researcher, WealthSolver and Xtools+

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**Time**

Half Day

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**Learning Outcome**

After completing this course, you should be able to:

- Produce a comprehensive Statement of Advice using the SOA wizard.
- Produce a review document using the Review wizard.
- Produce a Record of Advice document using the ROA wizard

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

Please visit our [website](#) for the Xplan training schedule and registration form.

## Iress Training

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

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