

Risk Research Course description

Xplan 2021



What is this course about?

This course is aimed at providing participants with knowledge and experience of the Risk Researcher module, a fully interactive insurance comparison tool that provides both qualitative and quantitative analysis for personal risk insurance products within Xplan.

This course provides an in-depth understand how the Xplan software and Risk Researcher fits within the advice journey and enables users to effectively research, compare and provide recommendations to clients on personal insurance products.

Who should attend this course?

Paraplanners / Advisers

Pre-Requisite

- Completion of an Xplan New User course.
- Good knowledge of Financial Planning concepts.

Time

Half Day

Learning Outcome

After completing this course, you should be able to:

- Review client details in Client Focus
- Use the Needs Analysis calculator to calculate the level of insurance your client needs
- Use Risk Researcher to provide insurance advice
- Use the various Research Tools available to recommend an appropriate product
- Implement your recommended Product

How do I register for this course?

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

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