WealthSolver
Course description

Xplan 2021

What is this course about?	This course is aimed at providing participants with knowledge and experience of the WealthSolver module - a superannuation, pension and investment comparison tool within Xplan. In this course, you will see how the Xplan module WealthSolver, fits within the advice journey and enables users to effectively research, compare and provide recommendations to clients on investment and retirement funding products.
Who should attend this course?	• Advisers and Paraplanners
Pre-Requisite	• Completion of the Xplan New User course • Good knowledge of Financial Planning concepts.
Time	Half Day
Learning Outcome	After completing this course, you should be able to: • Enter client details into the WealthSolver module specifically superannuation and investment details. • Search for information relating to over 1000 Superannuation Plans, Pension and Investment Plans. • Confidently compare Superannuation, Pension and Investments Funds against one another. • Create a proposal for a rollover of balances from one/many Superannuation Plans. • Create a proposal for a Self-Managed Super Fund (SMSF). • Create a like-for-like comparison for existing superannuation plans. • Create a proposal for an investment switch. • Use WealthSolver coding to generate tables and charts

How do I register for this course?	Please visit our website for the Xplan training schedule and registration form.

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