Xtools+ for Individuals Course description

Xplan 2021

What is this course about?	This course 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 course provides an in-depth understanding of how the Xplan module Xtools+ and how it fits within the advice journey and enables users to effectively project and analyse various strategies for clients.
Who should attend this course?	• Advisers and Paraplanners who wish to model a client's full financial position from wealth accumulation through to life expectancy.
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:
	• Navigate Xtools+ and complete data entry
	• Use Xtools+ to:
	    ○ Analyse a client's objectives
	    ○ Take into account a client's cashflow, assets and liabilities
	    ○ Model financial planning strategies across multiple life changes

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.

iress.com/support/training