Model Office Wizards Session description

Xplan June 2020 Major Release

What is this session 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 session 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 session.
Who should attend this session?	• Advisers, Paraplanners and Administrators wanting to utilise Model Office to assist in the production of Statements of Advice, Records of Advice and Client Reviews.
Pre-Requisite	• Completion of an Xplan New User session. • Good knowledge of Financial Planning concepts. • Ability to use the relevant advice modules; Portfolio, Risk Researcher, WealthSolver and Xtools+
Time	Half Day
Learning Outcome	After completing this session, 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
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

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