

Xtools

Webinar

What is this course about?

The Xtools NZ workshop will focus on using Xtools – XPLAN's scenario-based, quick projection calculators.

This workshop covers the following:

- Navigation and data entry input
- Using the calculators to model client scenarios
- Using the following Xtools:
 - Debt – Debt Consolidation
 - Debt – Loan Illustrator
 - Investment – Education Funding
 - Investment – Profiles
 - Investment – Savings
 - Retirement – Retirement Funding.

In this course, you will become familiar with the design and function of these tools, and become competent in the use of them.

Who should attend this course?

- Financial planners who want to model basic strategies and generate a quick projection of the client's financial position.
- Paraplanners who want to use the modelling functions and calculators in Xtools.

Time

1 hour

Learning Outcome

After completing this course, participants will be able to:

- Navigate and efficiently use Xtools
- Use the calculators to model client scenarios

How do I register for this course?

Contact your Account Executive or view the [XPLAN training schedule](#) on our website.

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