Portfolio
Session description

Xplan June 2020 Major Release

What is this session about?	This session is aimed at providing participants with knowledge and experience of Portfolios, used to manage, report and provide recommendations on a client's portfolio within Xplan. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios. In this session you will be provided with an in-depth understanding of how the Xplan software and Portfolios module fits in the advice journey enabling users to effectively run investment reporting, create, maintain and model recommendations for a client.
Who should attend this session?	• Advisers and Paraplanners
Pre-Requisite	• Completion of the Xplan New User session • Good knowledge of Financial Planning concepts.
Time	Half Day
Learning Outcome	After completing this session, you should be able to: • Navigate Xplan efficiently • Create and manage an existing portfolio • Understand Portfolio Accounts and Corporate Actions • Recommend and redeem investments • Run Portfolio reports and bulk reporting • Search Portfolio data
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

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