Review Management Session description

Xplan June 2020 Major Release

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What is this session about?	This course is designed to give you a detailed look at the review management capabilities of Xplan. This is an interactive session where you will observe demonstrations as well as participate in activities that are structured to provide you with an understanding of Xplan, and how you could use the system to provide advice to your financial planning clients
Who should attend this session?	• Administrators managing the review process • Advisers utilising Xplan to support client reviews • Practice Managers who design a review process • System Administrators
Pre-Requisite	• Completion of an Xplan New User session. • Good knowledge of Financial Planning concepts.
Time	Half Day
Learning Outcome	After completing this session, you should be able to: • Use an example thread to manage a new business process. • Manage and maintain Opt-In/Disclosure Statement and Fee for Service details. • Create and update client Review records. • Create client lists relating to Reviews and Opt-in/Disclosure Statement data. • Use an example case thread to manage a review process.
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

Iress Training

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