Risk Researcher Session description

Xplan June 2020 Major Release

What is this session about?	This session is aimed at providing participants with knowledge and experience of the Risk Researcher module, a fully interactive insurance comparison tool that provides both qualitative and quantitative analysis for personal risk insurance products within Xplan. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios. This session provides an in-depth understand how the Xplan software and Risk Researcher fits within the advice journey and enables users to effectively research, compare and provide recommendations to clients on personal insurance products.
Who should attend this session?	Paraplanners / Advisers
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: • Review client details in Client Focus • Use the Needs Analysis calculator to calculate the level of insurance your client needs • Use Risk Researcher to provide insurance advice • Use the various Research Tools available to recommend an appropriate product • Implement your recommended Product
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

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