Using Xplan & Client Portal for onboarding fact find & review

Session description

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What is this session about?	Available through Xplan, Client Portal securely connects you with your clients and provides them with an online view of their investments and financial life. In this session, you'll discover onboarding fact find best practice using Xplan and Client Portal. Also learn how to enable your clients to set their own agenda via the Client Portal, ahead of a review meeting.
Who should attend this session?	Principals / Practice Managers / Advisers
Assumed knowledge	• Existing Xplan user or New User training. • Basic understanding of Xplan and modules such as Client Focus.
Time	Webinar is up to 1 hour
Learning Outcome	After completing this session, you will have a basic understanding of: • The benefits of using Client Portal within your onboarding and review processes • How to manage client onboarding using Xplan and Client Portal • How to enable clients to set the agenda for a review discussion using the Client Portal's review check-in functionality
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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