

# WealthSolver 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 WealthSolver module - a superannuation, pension and investment comparison tool 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 module WealthSolver, fits within the advice journey and enables users to effectively research, compare and provide recommendations to clients on investment and retirement funding products.

---

**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:

- Enter client details into the WealthSolver module specifically superannuation and investment details.
- Search for information relating to over 1000 Superannuation Plans, Pension and Investment Plans.
- Confidently compare Superannuation, Pension and Investments Funds against one another.
- Create a proposal for a rollover of balances from one/many Superannuation Plans.
- Create a proposal for a Self-Managed Super Fund (SMSF).
- Create a like-for-like comparison for existing superannuation plans.

- 
- Create a proposal for an investment switch.
  - Use WealthSolver coding to generate tables and charts
- 

**How do I register for this session?**

Please visit our [website](#) for the Xplan training schedule and registration form.

## **Iress Training**

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

[iress.com/support/training](https://iress.com/support/training)



**iress.com**

Australia • Asia • Canada • New Zealand • South Africa • United Kingdom