Xtools+ Cashflow Session description

Xplan June 2020 Major Release

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What is this session about?	This session is aimed at providing participants with knowledge and experience of the Xtools+ module, a detailed cashflow modelling calculator within Xplan. This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios. This session provides an in-depth understand how the Xplan software and Xtools+ fits within the advice journey, enabling participants to effectively project and analyse various strategies for clients.
Who should attend this session?	• Advisers who wish to model strategies and generate a projection of the client's financial position.
Pre-Requisite	• Completion of the Xplan New User session • Good knowledge of Financial Planning concepts
Time	Half Day

Learning Outcome	After completing this session, participants will be able to:
	• Navigate Xtools+ and complete data entry.
	• Use Xtools+ to meet clients' goals while taking into account their cashflow, assets and liabilities.
	• Model financial planning strategies across multiple life changes including:
	    ○ Fund First Home and Holiday from KiwiSaver.
	    ○ Receive an inheritance.
	    ○ Pay debt.
	    ○ Invest into a PIE Investment or KiwiSaver.
	    ○ Compare scenarios for the best outcome.

How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

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