Xtools
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 module Xtools; a suite of single strategy cashflow modelling calculators. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios. This session provides an in-depth understanding of how the Xplan software and Xtools fits within the advice journey, enabling participants to effectively project and analysis various strategies for clients.
Who should attend this session?	• Advisers who wish to model basic strategies and generate a quick projection of the client's financial position or engage with the client using these. • Paraplanners who wish to use the modelling functions of these calculators
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:
	• Use Xtools to:
	    ○ Calculate savings achieved by consolidating multiple debts into a single debt
	    ○ Assess existing loan repayments
	    ○ Determine adequate savings to fund education expenses
	    ○ Assess investment growth over various risk profiles
	    ○ Calculate projected investment balances based on regular client savings

	○ Assess retirement funding and make recommendations ○ Take into account a client’s cashflow, assets and liabilities
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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