

# Xtools & Engage 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 modules Xtools and Engage. Xtools is a suite of single strategy cashflow modelling calculators and Engage is a suite of graphical interface modelling calculators used to perform and illustrate single strategy projections within Xplan.

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 modules, Xtools and Engage, fit within the advice journey and enables users to effectively project and analysis various strategies for clients.

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**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

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**Pre-Requisite**

- Completion of the Xplan New User session
- Good knowledge of Financial Planning concepts.

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**Time**

Half Day

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**Learning Outcome**

After completing this session, you should be able to:

Use Engage to:

- Analyse the effect of super consolidation
- Project a client's retirement planning
- Take into account a client's cash flow, assets and liabilities

Use Xtools to:

- Analyse a client's lifestyle goals;
- Calculate savings achieved by consolidating multiple debts into a single debt;
- Determine adequate savings to fund education expenses;
- Analyse social security entitlements
- Take into account a client's cash flow, assets and liabilities.

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

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

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