

Xtools+ for Entities

Session description

Xplan June 2020 Major Release



What is this session about?	<p>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.</p> <p>This session provides an in-depth understanding of how the Xplan module Xtools+, fits within the advice journey and enables users to effectively project and analyse various strategies for clients, SMSFs, a Company, and Trusts.</p>
Who should attend this session?	<ul style="list-style-type: none"> • Advisers and Paraplanners who wish to model a client’s full financial position from wealth accumulation through to life expectancy.
Pre-Requisite	<ul style="list-style-type: none"> • Completion of the Xplan New User session • Good knowledge of Financial Planning concepts.
Time	Half Day
Learning Outcome	<p>After completing this session, you should be able to:</p> <ul style="list-style-type: none"> • Navigate Xtools+ and complete data entry • Use Xtools+ to: <ul style="list-style-type: none"> ○ Create a SMSF, Company and Trust into CALM ○ Model multiple strategies relevant to these entities into CALM ○ Project the full financial position for the Entity Group
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

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