Xtools+ for Individuals 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 understanding of how the Xplan module Xtools+ and how it fits within the advice journey and enables users to effectively project and analyse various strategies for clients.
Who should attend this session?	• Advisers and Paraplanners who wish to model a client's full financial position from wealth accumulation through to life expectancy.
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:
	• Navigate Xtools+ and complete data entry
	• Use Xtools+ to:
	    ○ Analyse a client's objectives
	    ○ Take into account a client's cashflow, assets and liabilities
	    ○ Model financial planning strategies across multiple life changes

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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