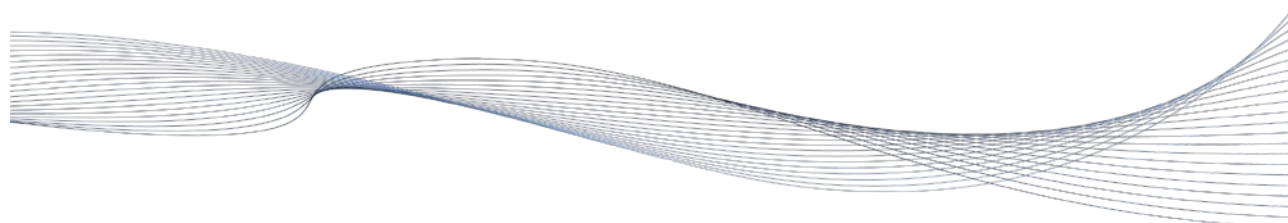


XPLAN IRESS Portfolio System

Supplementary Course



- Overview:** This main objective of this course is to equip advisers and paraplanners with sufficient skills to use the Investment Portfolio System in XPLAN to manage the client's investment portfolio.
- Recommended for:**
- Financial advisers
 - Paraplanners.
- Prerequisites:** Completion of any XPLAN New User course or existing users of XPLAN.
- Duration:** Half day.
- Learning Outcomes:** After completing this course, participants will be able to:
- Create portfolios, and add existing and new purchases and sales.
 - Manage the portfolio, including running Corporate Actions and reports.
 - Perform portfolio modelling, including using Recommendations.
- Register:** Contact your Account Executive or view the [XPLAN training schedule](#) on our website.

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