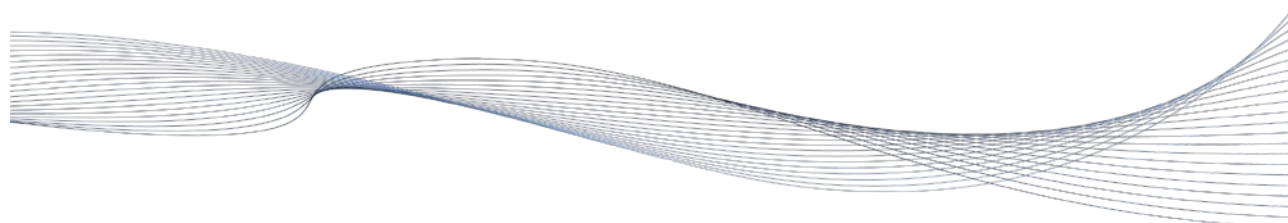


XPLAN New User – Adviser

Core Course



Overview: The main objective of this course is to equip advisers and paraplanners with sufficient skills to use XPLAN to provide recommendations to clients.

This course is based on a scenario, and uses the six step “Advice to Client” process as a guide.

Recommended for:

- Financial Planners
- Paraplanners
- Principals who wants to know about the planning functionalities of XPLAN.

Prerequisites:

- Basic Microsoft skills
- Basic financial planning knowledge.

Duration: 1 day.

Learning Outcomes: After completing this course, participants will be able to:

- Navigate XPLAN
- Navigate Client Focus
- Use IPS to manage client portfolio
- Use XTools and XTools+ to provide appropriate advice to clients
- Use IQM+ to provide risk advice to clients
- Merge the Statement of Advice
- Understand the client management capabilities in XPLAN.

Register: Contact your Account Executive or view the [XPLAN training schedule](#) on our website.

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