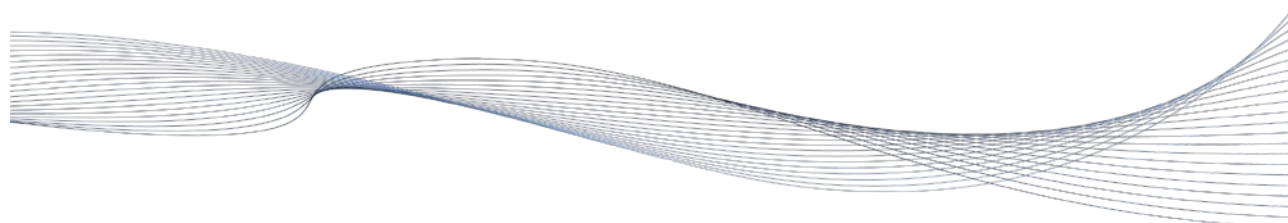


XPLAN New User – Risk Advice

Core Course



Overview:

The main objective of this course is to equip advisers and paraplanners with sufficient skills to use XPLAN to provide insurance 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 want to know about the insurance capabilities of XPLAN.

Prerequisites:

- Basic Microsoft skills
- Basic financial planning knowledge.

Duration:

Half day.

Learning Outcomes:

After completing this course, participants will be able to:

- Navigate XPLAN
- Create a new client
- Navigate Client Focus
- Enter the client’s current insurance investments
- Use IQM+ to provide risk advice to clients
- Merge the Statement of Advice
- Have an overview of the client management capabilities in XPLAN.

Register:

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

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