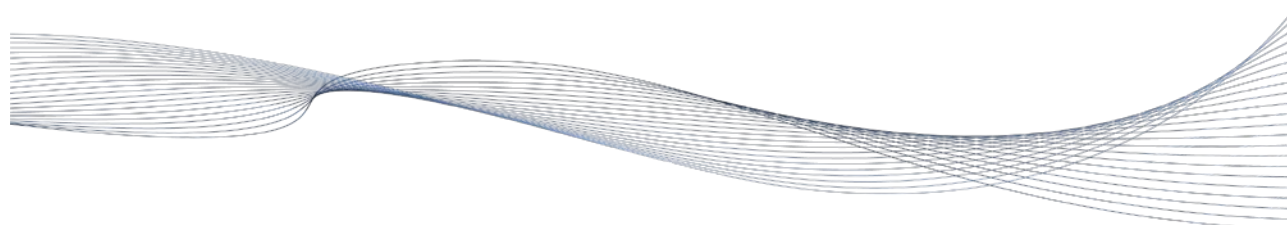


XPLAN XTOOLS+ Entities

Supplementary Course



- Overview:** This course looks at adding Entities to XTOOLS+ (CALM). For example, Companies, Trusts and Self Managed Super Funds.
- This course will teach you how to model various steps, including:
- Personal and SMSF contributions
 - SMSF accumulation accounts
 - Setting up and selling of entity assets
 - Setting up new superannuation pensions in retirement (including Transition to Retirement Pensions) in SMSF.
- Recommended for:** Financial Planners and Para planners who want to model entities individually or as part of a client's portfolio.
- Prerequisites:** Completion of an XPLAN New User course.
- Duration:** Half day
- Learning Outcomes:** After completing this course, participants will be able to:
- Project an entity's full financial position
 - Model multiple scenarios (for example, Retirement Only).
- Register:** Contact your Account Executive or view the [XPLAN training schedule](#) on our website.

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