XPLAN XTOOLS and XTOOLS+

Wealth Creation

Supplementary Course

Overview:

This course has a wealth creation perspective, and covers:

- XTOOLS and XTOOLS+ navigation and data entry
- Using XTOOLS calculators to model different client scenarios
- Using XTOOLS to:
  - Analyze a client's objectives
  - Take into account a client's cash flow, assets and liabilities
  - Model a financial planning strategy across multiple life changes.

This course workshops several working scenarios. You will become familiar with each tool and see how the results are presented.

This course is similar to the Advanced XTOOLS+ workshop and initial XTOOLS core courses. It is a good refresher course and provides opportunity to ask questions and build on your existing XTOOLS knowledge.

Recommended for:

- Financial Planners who want to model a client's full financial position from wealth accumulation through to life expectancy.
- Paraplanners who want to use the modelling functions and calculators in XTOOLS.

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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