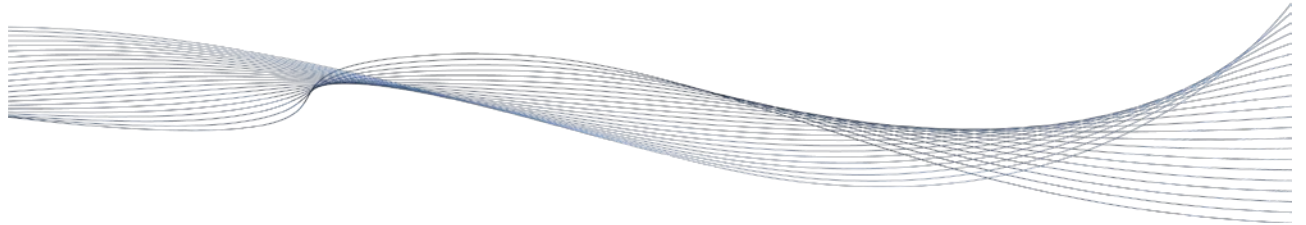


XPLAN XTOOLS and XTOOLS+

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.

AUSTRALIA

Melbourne | +61 3 9018 5800
Sydney | +61 2 8273 7000
Brisbane | +61 7 3011 4700
Perth | +61 8 6211 5900
Adelaide | +61 3 9018 5800

ASIA

Hong Kong | +852 3965 3341
Singapore | +65 6672 6288

CANADA

Toronto | +1 416 907 9200

NEW ZEALAND

Auckland | +64 9 300 5571
Wellington | +64 4 462 6850

SOUTH AFRICA

Johannesburg | +27 11 236 4700
Durban | +27 31 203 7500
Cape Town | +27 21 918 6640