



Prestwood® Financial Planning 2 Day Course Timetable

Day 1

- 10.00 am Introduction including objectives of the course and overview.
- 10.15 am How to create a new client using the 'Peter Gray' case study. This section will include an introduction to the Planning menu, the list of available items and how to enter client items from the item's tree.
- 10.45 am How to enter items from the statements.
An introduction to the Net Worth Statement and future Net Worth.
- 11.00 am The What-If Tab
An introduction to the catastrophes and the scenarios using the Property item and the Car item.
- 11.30 am Break
- 11.40 am The Net Worth Statements - including Detailed, Summary, Assets Chart and History.
- 12.00 pm The Income Statement – including Detailed, Summary, Net Spendable Income and Chart.
- 12.15 pm The Personal Pension item, The Final Salary item and the Pension Statement.
- 1.00 pm LUNCH
- 2.00 pm Mortgages and Loans and the Mortgage calculator.
- 2.15 pm Expenditure items and the Expenditure Statement including Detailed, Summary, Chart and Income & Expenditure. An introduction to the Surplus Account.

- 2.45 pm Settings – the inflation rate, the Surplus Account rates and the Desired Future Lifestyle Age.
How to customise the statement headings.
- 3.00 pm The Cash-Flow Statement
The Capital Chart, Formulae and Target, Statement Details, Inflows and Outflows Chart and Income Requirements
- 3.30 pm The Cash-Flow Statement
The Catastrophes and Assurance requirements
- 3.40 pm Break
- 3.50 pm Using other scenarios to find solutions to a cash shortfall.
- 4.15 pm The Will item, Estate Statement and Lifetime Gifts
- 4.30 pm FINISH Day 1

* The course running order may be subject to variation.

Day 2

- 10.00 am Discussion session – Day 1 Learning
- 10.10 am How to create a New Scenario - using the 'exclude' tool to manage the scenarios.
- 10.50 am Revision of using scenario's to find solutions to a cash shortfall.
- 11.10 am Catastrophe Planning.
Revision of the Assurance Requirements tab and of how to make target calculations e.g. what should be the annual value of a family income benefit?
- 11.30 am Break
- 11.40 am The role of the template and how to create your own template.
- 12.00 pm Creating a new Financial Plan Report.
The session will focus on how to create a report which includes details of a client's current financial situation, the situation if the planner's recommendations are adopted and the situation if a catastrophe should occur.
- 1.00 pm LUNCH

Afternoon

The afternoon session is designed to allow the trainee time to consolidate learning by the use of a case study. This can either be the trainees chosen case or the Prestwood® case study. The planned finish time for the day is 4.30pm.

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