



### ***Truth® Level 1 Course Timetable***

- 10:00 am Introduction including objectives of the course
- 10:15 am The Data Entry Wizard  
How to create a new client using the Data Entry Wizard.
- 11:30 am Break
- 11:45 am The Item Control Screen  
How to navigate the Item Control screen and how to add and amend items. This section will include an introduction to the Planning menu, the list of available items and the importance of selecting the right item type.
- 12:00 pm The Golden Rules  
The key aspects of data entry, highlighted with certain item types
- 12:15 pm The What-If Tab  
An introduction to the catastrophes and the scenarios.
- 12:30 pm The Net Worth Statement  
An introduction to the Net Worth Statement and future Net Worth.  
How to make changes to the items from the statements.
- 1:00 pm LUNCH
- 1:30 pm The Income Statement  
Explanation of the Income statement in current and future years.
- 1:45 pm The Expenditure Statement

Explanation of the Expenditure Statement including a detailed inspection of the Income & Expenditure comparison and the effect this has on the Surplus Account.

- 2:15 pm     Settings  
How to change planning assumptions such as Inflation, Net Return and Overdraft and the effect these assumptions have on the Surplus Account calculations and the planning statements.
- 2:30 pm     The Cash-Flow Statement  
Explanation of the Cash-Flow Statement, including how to set Default tabs for when a statement is opened, how to use the Income Requirements tab and how to use the Key Dates function.
- 3:00 pm     Break
- 3:15 pm     'What If' Scenarios  
Using other scenarios to find solutions to a cash shortfall.
- 4:00 pm     Printing the statements  
This session includes customising the Header and Footer and changing font styles.
- 4:20 pm     The Fact Find Questionnaire
- 4:30 pm     FINISH

\*     If time allows an overview of the Will item and Estate Statement will be given.

\*\*     The course running order may be subject to variation