



Truth® Level 1 Course Timetable

- 10.00 am Introduction including objectives of the course
- 10.15 am A review of the Bucket. Paul Armson's DVD presentation.
- 10.30 am How to create a new client using the 'Peter Gray' case study. This section will focus on entering data by using the Data Entry Wizard.
- 11.30 am Break
- 11.45 am This section will include an introduction to the Planning menu, the list of available items and how to enter client items from the Items tree.
- 12.00 pm How to enter items or make changes to the items from the statements. An introduction to the Net Worth Statement and future Net Worth.
- 12.20 pm The What-If Tab
An introduction to the catastrophes and the scenarios using the Property item and the Car item.
- 12.45 pm LUNCH
- 13.15 pm The Income Statement – including Detailed, Summary, Net Spendable Income and Chart.
- 13.40 pm The Pension Statement. Lifetime and Annual Allowances.
- 13.50 pm Expenditure items and the Expenditure Statement including Detailed, Summary, Chart and Income & Expenditure. An introduction to the Surplus Account.

- 14.15 pm Settings – the inflation rate, the Surplus Account rates and the Desired Future Lifestyle Age.
- 14.30 pm The Cash-Flow Statement.
The Capital Chart, Formulae and Target, Statement Details, Inflows and Outflows Chart and Income Requirements.
- 15.00 pm Break
- 15.15 pm The Draft Recommendations Scenario
Using other scenarios to find solutions to a cash shortfall.
- 16.00 pm Printing the statements.
This session includes customising the header and footer and changing font styles.
- 16.20 pm The Fact Find Questionnaire.
- 16.30 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.