truth™

FINANCIAL PLANNING SOFTWARE

Truth® Level 2 Course Timetable

10.00 am	Introduction including objectives of the course.
10.10 am	Paul Armson's DVD presentation - 'How to use the software with clients'.
10.50 am	Revision session - how to review client data, make necessary amendments and customise the statements. In the session we will look at Detailed Net Worth, Detailed Income, Detailed Expenditure, Inflows and Outflows and Cash-Flow Formulae and Target. The aim is to achieve understanding of our client Marcus and Miranda Austin's current financial situation.
11.50 am	Break
12.00 pm	Creating a New Scenario – 'Marcus and Miranda want to retire when Marcus is 55'.
12.40 pm	Finding a solution to a cash shortfall in the scenario 'Marcus and Miranda want to retire when Marcus is 55'.
1.00 pm	LUNCH
1.30 pm	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?
2.00 pm	Revision session – printing the statements.
2.15 pm	The role of the template and how to create your own template.
2.30 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.
3.30 pm	Break
3.45 pm	How to use a new report design with existing clients and new clients. How to customise the header, footer and font styles.
4.10 pm	How to enter contact history. The session will cover document management including scanning in and attaching documents to contact information.
4.25 pm	Question and Answer session.
4.30 pm	FINISH

* The course running order may be subject to variation.