



### ***Truth® Level 3 Course Timetable***

10.00 am Overview of the Course – Aims and Objectives

10.10 am Why use the software with the client

Refresher of video clips Paul talks about how he will use truth® with the client, how truth® was designed to be used with the client and how the client starts to take ownership of their financial plan AND he says how truth® is the best financial planning software an adviser can get their hands on.

One meeting approach overview

10.15 am Presenting the Data Refresher – making the client feel comfortable

Refresher of video clip Paul starts to show how he takes the client through the data to make them feel comfortable.

10.20 am Presenting the Data Refresher – Demonstration Using Marcus Austin

The session will include instructions of what must be included in the paired role-play presentation.

11.15 am Paired Role Play - Case Study A (Part 1) – Preparation Time

#### **FOCUS ON CURRENT POSITION AND CATASTROPHES**

Each pair will be given a fact find, digging deeper responses and a summary of the client in addition to information about the client that only one of the pair should know (the assumed client).

The pair should familiarise themselves with the information given and with the data entered in the software for the client with a view to one of them (the assumed planner) presenting and changing the data in the current position.

- 11.30 am Break
- 11.45 am Paired Role Play - Case Study A (Part 2) – Presenting and changing the data.
- The assumed planner will deliver the meeting to the assumed client
- 12.45 pm LUNCH

***After lunch, the assumed roles of planner and client will be reversed.***

- 1.15 pm Paired Role Play - Case Study B (Part 1) – Preparation Time
- FOCUS ON CURRENT POSITION AND CATASTROPHES
- Each pair will be given a fact find, digging deeper responses and a summary of the client in addition to information about the client that only one of the pair should know (the assumed client).
- The pair should familiarise themselves with the information given and with the data entered in the software for the client with a view to one of them (the assumed planner) presenting and changing the data in the current position.
- 1.30 pm Paired Role Play - Case Study B (Part 2) – Presenting and changing the data.
- The assumed planner will deliver the meeting to the assumed client
- 2.30 pm Review and Feedback for Case Studies A & B (15 minutes for each case)
- 3.00 pm Break
- 3.10 pm Entering Recommendations in 'Draft Recommendations' scenario (30 minutes for each case)
- 4.10pm Questions & Answers and Feedback Forms completed
- 4.30pm FINISH
- \* The course running order may be subject to variation