



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 how truth® was designed to be used with the client and how the client starts to take ownership of their financial plan the more they change.

One meeting approach overview

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

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.

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