

WELCOME



Robert Coulter,
General Manager, Partnerships

Webinar Wed 18 Nov

11.00am to 12.00pm

Using Xplan efficiently for Paraplanners

1hr CPD

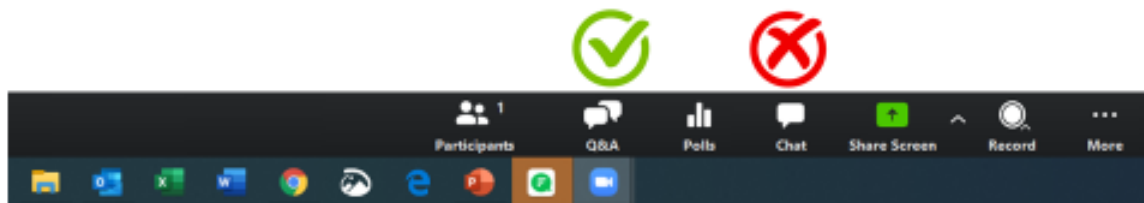


Andrew Austen
Training Executive, IRESS

Today's webinar



- **1 Hour CPD** available – AFA will send details within the next week.
- As a webinar attendee you are on 'mute' during the webinar
- Questions will be answered at the end of the presentation. Please use the Zoom QA function (not the Chat function) to ask your question.



AFA Xplan CALM

Using Xplan efficiently for paraplanners

Andrew Austen – Training Executive



Agenda



Welcome and Introduction
What's new in CALM
Efficient use of CALM
Q and A
Consolidation of learning & feedback
FINISH

By the end of today you will have learnt



What's new:

- Property input
- Updates to Aged care
- Defined benefits

Efficient use:

- Save and lock scenarios, and managing reviews
- Import selected data
- Key dates
- Balance cap excess

Frequent Questions



1. How to model purchasing an investment property with delayed rental income
2. How to change the rate of CPI on age pension entitlements
3. How to model a spouse contribution
4. Modelling LRBA's
5. Additional training - contract paraplanners can book into standard monthly training:
<https://www.iress.com/support/training/au-training/>
6. Iress Community – request registration

More resources



Further classroom



Xplan Complete webinars



eLearning



Training material



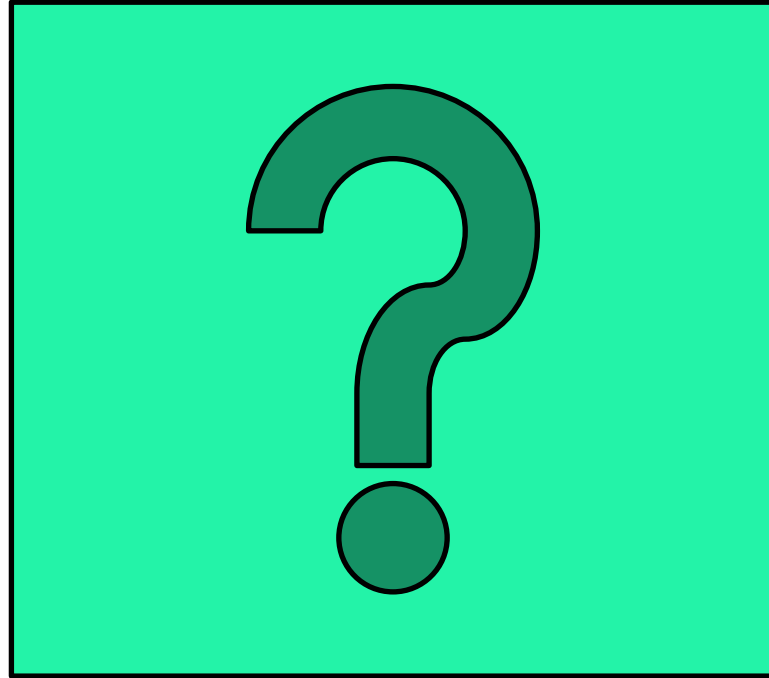
Custom training



Iress Community

Practice what you have learnt

Open Questions



Thank You

Xplan Support

T: 1300 1300 69

E: xplansupport@iress.com.au

iress.com/au





AFA Virtual Conference
Now available on demand
afaconference.com.au



- **40+ hours of professionally filmed content**
- **Industry panels, keynotes**
- **Masterclasses**
- **Partner virtual expos**
- **Up to 36 CPD hours**
- **Access until 12 Feb 2021**
- **Special on-demand registration price \$200**

Access to webinar content

- Today's webinar recording, presentation slides and a CPD assessment quiz will be uploaded to afa.asn.au
- All registrants will receive an email confirming when available
- Get in touch at info@afa.asn.au if you have any questions

Thank you for joining us today