



XPLAN Software Training

- Get the skills that employers really want.
- Unrivalled support. Delivered with care.
- Absolute flexibility. Your way, your terms.

Get a head start in your career

Many financial services roles request XPLAN experience. This course has been developed to help you get your head around the most common software used by financial planners and their teams.

Having XPLAN experience, combined with an Advanced Diploma of Paraplanning, can give you a better chance of getting a first job as a paraplanner or support officer. This XPLAN course will help set you apart in the job market.

What does the course cover?

- **Investments**
- **Superannuation**
- **Insurance**

Key benefits

- **Tailored for RG146 Financial Planning**
- **Free access to XPlan software for 6 months**
- **XPLAN is used by 70% of financial planners**

What is XPLAN?

XPLAN is the software at the heart of financial planning operations. It's an end-to-end solution for advice delivery within small, medium and large financial advice firms. Every task, calculation, administrative record, piece of research, every communication that's part of the advice process – it's all done in XPLAN.

It's cloud based, with a responsive interface, so it's used by a lot of mobile advisers and planning professionals who work remotely. There's also a client login option, so they can see their essential stats any time.

Most financial advice practices in Australia (approx. 70%) use XPLAN. That includes the Big 4 banks. Planning to work for a boutique practice? XPLAN is scalable, so whether you're working with one adviser or one hundred advisers, chances are you'll be using XPLAN at some point in your career.



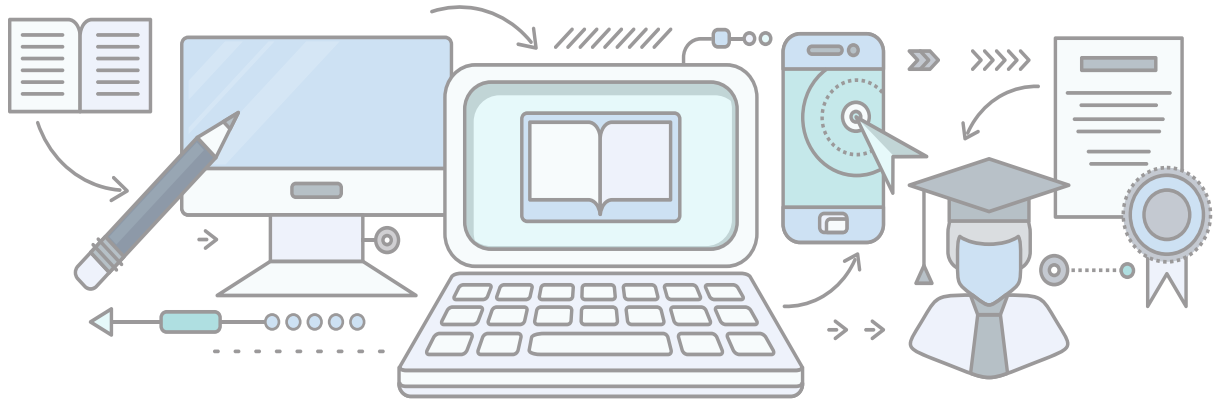
But I'm not in the front office, how is XPLAN applied in different parts of a firm?

XPLAN isn't just used by advisers as they work directly with clients. It's used by para-planners and administrators in all parts of the advice business.

Front office: When clients first meet with a licensed financial adviser, their details are loaded into XPLAN. From the get go the adviser can use XPLAN's built-in modelling tools to compare and discuss different strategies with clients.

Middle office: The middle office is where associate advisers and practice managers work their magic. They use XPLAN to make sure all client details are correct and filled in. This may mean chasing up further details that the software can incorporate into its modelling and projections. Once this is done, the adviser can implement the client's instructions effectively.

Back office: The back office is where advice is researched, developed, and documented. Back office workers, including paraplanners, can use XPLAN to develop a comprehensive statement of advice (SoA).



What is the course duration?

Students are expected to complete the course within six months. Some may get it done quicker, depending on their learning background and work experience.

Having trouble wrapping your head around a concept or assessment piece? You can reach out to your trainer for support at any time during these six months.

What is the course structure?

This course is delivered completely online. This means you'll access your learning and assessment resources through an online portal. You can access this anywhere and anytime. You'll also have access to a student discussion group on Facebook.

What are the entry requirements?

There are no formal entry requirements. Just bring your drive, motivation and passion for the industry. That said, if this is your first time studying at this level, we'll need to check your levels of English and maths before you enrol. People with disabilities are encouraged and supported to apply.

Assessments

The experts who design and deliver our courses have developed an assessment framework that's uniquely designed to help you gain a deep understanding of the material. Assessment formats include:

- Case studies
- Short-answer questions
- Simulation exercises
- Projects

Course costs

Monarch's courses are competitively priced.

Check our website for the most up-to-date prices at www.monarch.edu.au/courses

or call us on 1300 738 955.

Why choose Monarch Institute?

**You need a different learning experience.
We're ready to deliver.**

Expertise

- ✓ Courses developed with leading academics and industry associations
- ✓ Delivered by brilliant trainers who work with corporate leaders
- ✓ Learn from professionals using real world case studies

Flexibility

- ✓ Fit study around work, family, life
- ✓ Start immediately, or down the track
- ✓ Flexible payment options

Support

- ✓ Dedicated team of trainers and support staff on hand to guide you
- ✓ Up to date, easy to understand course materials
- ✓ Fast assessment turnaround times with comprehensive trainer feedback

Enrol today

Commence your XPLAN software training with Monarch Institute today to take the next step forward in your career.



To discuss the course that's right for you call
1300 738 955



To find out more information email
info@monarch.edu.au



To enrol, visit our website
www.monarch.edu.au

