



Truth® Level 1 Course Timetable

- 10:00 am Introduction including objectives of the course
- 10:15 am Creating Clients
How to create clients, focusing on the **Data Entry Wizard**. This section will also look at importing data from other systems and how to create and use the **importable Fact Finds**. The Data Entry Wizard section will also introduce the **Four Golden Rules of Data Entry**
- 11:15 am BREAK
- 11:30 am Data Entry (continued)
Explanation of the critical aspects of data entry, highlighted with specific item types
- 11:45 am The Fact Find Screen
Navigation of the Fact Find screen, how to add and amend items and an introduction to **catastrophes and scenarios**. This section will also explain the importance of **Key Dates**
- 12:30 pm The Net Worth Statement
An explanation of the Net Worth statement, including how to make changes to items from a statement and introducing the Surplus Account
- 1:00 pm LUNCH
- 1:30 pm The Income Statement
An explanation of the Income statement and the tax calculations built into Truth

- 1:45 pm The Expenditure Statement
An explanation of the Expenditure statement, highlighting the importance of the Income & Expenditure comparison and the Lifelong Surplus/Deficit chart and the effect this has on the Surplus Account
- 2:15 pm Settings
How to change planning assumptions such as Inflation, Net Return and Overdraft Rate and the effect these assumptions have on the Surplus Account calculations and the planning statements
- 2:30 pm The Cash-Flow Statement
Explanation of the Cash-Flow Statement, including how to use the **Planning Tools** and how to use Key Dates
- 3:00 pm BREAK
- 3:15 pm 'What If' Scenarios
Using other scenarios to find solutions to a Cash-Flow shortfall or surplus
- 4:15 pm Printing Statements
This session covers basic report writing options, including how to customise the Header and Footer and changing font styles
- 4:30 pm FINISH

The course running order may be subject to variation