Truth® Level 2 Course Timetable

10:00 am	Introduction including objectives of the course.
10:10 am	How to use the software with clients Revision session - how to present the data to clients in a planning meeting and review the planning assumptions making necessary amendments, by looking at Net Worth, Income, Expenditure, Inflows and Outflows and the Cash-Flow Formulae and Target and Capital Chart screens. Also how to customise the statements.
11:30 am	Break
11:45 am	Creating a New Scenario How to create a new What If scenario and the use of the Exclude function. Also how to use the Key Dates feature and how to find a solution to a cash shortfall by 'targetting'.
1:00 pm	LUNCH
1:30 pm	Catastrophe Planning. Revision of the Assurance Requirements tab and of how to make target calculations through recommended products (for example: 'How much extra family income benefit or lump sum term cover is required?')
2:00 pm	Revision session – printing the statements
2:15 pm	The role of the template and how to create your own template.
2:30 pm	Creating a new Financial Plan Report. The session will focus on how to create a report which includes details of a client's current financial situation, the situation if the planner's recommendations are adopted and the situation if a catastrophe should occur.

3:30 pm	Break
3:45 pm	How to use a new report design with existing clients and new clients. How to customise the header, footer and font styles.
4:10 pm	How to enter contact history. The session will cover document management including scanning in and attaching documents to contact information.
4:25 pm	Question and Answer session.
4:30 pm	FINISH
*	The course running order may be subject to variation