TRANSVAS WITH TVC

During this 3 part webinar session we will equip you with the skill and knowledge to get started with Transvas. This three part session will provide an overview of the main screens and inputs to get you started with setting up your first Client, Scheme and Case. We will also cover, in brief, some of the more complex functions of Transvas that are detailed in depth in dedicated webinar sessions.

SCHEME LIBRARY, CLIENTS & CASES

- Understanding the difference between Scheme, Client & Case
- The benefits of having a Scheme library

YOUR FIRST CLIENT, CASE & SCHEME

- How to create a new Client, Case and Scheme on Transvas
- Adding Scheme information and understanding what Scheme information to input on each screen

RETIREMENT BENEFIT SLICES

- How to create a pension slice for each tranche of deferred benefit in the Scheme
- Understanding the minimum inputs that are required on each slice of benefit
- A brief overview of how to enter early/late retirement and cash commutation factors

REVALUATION & ESCALATION

- Understanding the different types of revaluation and escalation increases, and how best to reflect these on each benefit slice

TOOLBARS & NAVIGATION

- The do's and don'ts of Transvas
- Understanding how to navigate Transvas

ADDING CASE INFORMATION

- Understanding what information is needed to input on each screen to set up your Case in full

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PENSION BREAKDOWN REPORT

- What is a Pension Breakdown Report?
- How is this produced?
- Understanding how to use the function to match a scheme quote or to produce a projection using FCA assumptions

VALIDATION REPORT

- What is a Validation Report?
- How is this produced?
- Understanding the difference between Problems & Warnings, and which need addressing before completing the report

CRITICAL YIELDS REPORT

- What is a Critical Yields Report?
- How is this produced?
- Understanding the information this report provides

DATA REPORT

- What is a Data Report?
- How is this produced?
- Understanding the inputs and assumptions shown on the Data Report

SESSION DURATION

This is a 3-part session with each part lasting for 40 minutes followed by a 20-minute break, and the opportunity for questions on completion of each part.

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