

CASHFLOW MODELLER

During this two part webinar session we will equip you with the skills and knowledge to get started with FinCalc Cashflow Modeller. This session will provide an overview of the FinCalc Set-up, the process of completing the current position, adding Scenarios and reviewing the Results. We will also cover, in brief, some of the more complex functions of Cashflow Modeller that also have dedicated webinar sessions available.

FINCALC SET-UP

- Brief look into how to add Attitude to Risk Levels, Growth Sets and Assumption Sets
- The benefits of the above, and how these Settings pull through to your Company's Cashflows

CLIENT SET-UP

- How to navigate through the FinCalc dashboard
- Adding a Client, adding Relationships and building a Client Profile.

COMPLETING THE CURRENT POSITION

- Viewing the Cashflow Dashboard
- How to navigate through the Current Position
- How to Input your client's financial information.

CREATING A TIMELINE FOR YOUR CLIENTS

- Reviewing the autogenerated Events and creating Client Specific Events
- Explaining how to use these Events through the cashflow

CLIENT PORTAL

- How to share the Cashflow with your Clients
- How to use the Client Profile and an overview of the simplicity of the inputs for each client

ADDING CONTRIBUTIONS AND WITHDRAWALS

- How to link a pension to an income and adding Employee and Employer Pension Contributions
- An overview of the complexity and flexibility of the pension withdrawals



ADDING SCENARIOS

- An overview of the Scenario process and the simplicity of the process
- Exploring the inputs within this screen
- Viewing our Pre-designed complex Scenarios with easy to follow inputs

REVIEWING THE CHARTS

- An introduction to the Charts and the make-up of these
- How to View different Scenarios Side by Side
- How to easily 'Drag and Drop' the charts straight into word
- A quick overview of Advisories, Warnings and Problems

ON SCREEN DATA REPORTS

- A look at the numbers behind the Charts
- Ability to drill down into the make-up of the figures year on year

FULL REPORT

- How is this produced
- Understanding the inputs and assumptions shown on the Report
- A look at how multiple scenarios can be shown
- How the report looks in both portrait and landscape

SESSION DURATION

This is a 2-part session with each part lasting for 45 minutes followed by a 15-minute break, and the opportunity for questions on completion of each part.

