RETIREMENT MODELLER

During this webinar session we will equip you with the skills and knowledge to get started with FinCalc Retirement Modeller. This session will provide an overview of the Client Set-up, the process of completing the Retirement Modeller and reviewing the Results.

CLIENT SET-UP

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

COMPLETING THE RETIREMENT MODELLER

- How to complete the Retirement Modeller Screens
- A brief overview of the input screens including Client Information, Pension Fund, Existing Contributions, Target Income and Other Incomes

REVIEWING THE CHARTS

- An introduction to the Charts and the make-up of these
- How to navigate the Charts
- A quick overview of Advisories, Warnings and Problems

FULL REPORT

- How is this produced
- Understanding the inputs and assumptions shown on the Report

SESSION DURATION

This is a single 30-minute session with the opportunity for questions at the end of the session.

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