

## Spring 2023 Training Academy Agenda

09:00 – 09:30	Registration, breakfast and networking
09:30 – 09:40	Welcome – Introduction to 'One System' for all your financial planning needs. The latest version of Dynamic Planner is nearly complete. How will that powerfully help you?
09:40 – 10:15	Dynamic Planner demonstration Part 1 – Collaborate digitally with a new client and seamlessly pull information they share with you into a tailored, 'pre-meeting' review report
10:15 – 10:35	Dynamic Planner Partner session – Hot off the press, investment and economic analysis from a leading asset management speaker. Plus, investment solutions tailored for your clients
10:35 – 10:45	Break for tea and coffee
10:45 – 11:30	Dynamic Planner demonstration Part 2 – Time-saving cash flow planning, powered by information provided by your client. Make a recommendation, link it to your target market, and see investment research in the latest version of Dynamic Planner
11:30 – 11:45	What's next for Dynamic Planner in 2023? – Flexible report writer, tailoring your communications aligned to a client's understanding, in line with the Consumer Duty. Further exclusive first looks at investment research in the latest version of Dynamic Planner. And a chance to ask your questions

