Partner Training Checklist

ADVICENT UNIVERSITY

Instructions

Use this handy checklist as a guide for your on-line training program. Watch the videos in this recommended order and if questions arise, contact Advicent Partner Support at 888.692.3474. You are on your way to success using the Advicent tools!

	Date Completed
Introduction to NaviPlan	☐ ________

Core: *General product knowledge for all users of NaviPlan.*

• Getting Started with NaviPlan	☐ ________
• Defining Asset Allocation	☐ ________
• Using Standalone Reports	☐ ________
• Using Next Generation Reports	☐ ________
• Analyzing Goals with Scenario Manager	☐ ________
• Navigating the Help System	☐ ________

Cash Flow and Asset Planning: *Enter your clients' financial information.*

• Entering Accounts	☐ ________
• Entering Assets & Liabilities	☐ ________
• Establishing Cash Flow	☐ ________
• Entering Annuities	☐ ________
• Modeling the Sale and Purchase of a House........	☐ ________
• Using Holding Companies	☐ ________

Goal Planning: *Enter your clients' current plans and goals.*

• Setting a Retirement Goal	☐ ________
• Setting an Education Goal	☐ ________
• Entering Existing Insurance	☐ ________
• Setting a Survivor Income Goal	☐ ________

Lead Generation: *Leverage NaviPlan Leads™ to establish an online presence that engages web site visitors by assessing their retirement, education, or major purchase goal funding.*

NaviPlan Leads™ Overview.. ☐ ________

Forecaster Assessments: *This streamlined analysis is designed to give a financial overview in under 10 minutes. Perfect for product sales, prospects, and clients with simple financial situations and goals.*

- Using the Forecaster Assessment .... ☐ ________
- Analysing Retirement .... ☐ ________
- Analysing Education .... ☐ ________
- Analysing Disability Income .... ☐ ________
- Using the Life Insurance Quick Assessment .... ☐ ________

Presentation Module: *Use this interactive sales tool to connect with clients and educate them on key concepts on retirement, survivor needs, saving for education, or cash flow planning.*

- Tour of the Presentation Module... ☐ ________
- Creating a New Client in the Presentation Module....................................... ☐ ________
- Cash Flow Planning Presentation.. ☐ ________