



# Advice Template Analysis

## DONE FOR YOU FULLY CUSTOMISED XPLAN

**XPLAN TAILORED TO SUIT YOUR STAFF AND BUSINESS GOALS**

WHAT DO I NEED THE MOST?



- ◆ Spend less time generating advice documents
- ◆ Making the Xplan advice wizard more user-friendly and intuitive.
- ◆ Wizards and Templates updated and relevant
- ◆ Getting ideas on making our template or process more efficient
- ◆ Training on how to use our Templates/Wizards

**If you need any of the above, contact Specialist PMC Now  
and book an Xplan Review Template Analysis  
for \$1,700 plus GST**

**[karen@specialistpmc.com.au](mailto:karen@specialistpmc.com.au) / 1300 664 665**

### What is a Review Template Analysis?

A review of your advice document template including:

- ◆ Comprehensive testing of your existing advice template
- ◆ Review of advice wizard
- ◆ Integration between Fact Find, Review Reports and advice documents
- ◆ Checking to see if your modelling is integrated and working correctly
- ◆ Ensuring your Fee Data is integrating
- ◆ Identification of formatting issues
- ◆ Identifying any improvements that make your advice generation process more efficient

### Benefits of a Review Template Analysis?

- ✓ Perfect for businesses wanting to freshen up their advice template or improve their efficiency
- ✓ The assigning of your own Practice Management Consultant
- ✓ You will receive a detailed report and quote for addressing issues within the template and implementing suggested enhancements.
- ✓ Fee structures that are extremely competitive and flexible

