PlanPlus Global

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PlanPlus Learning Circle is a live training community designed to inform and educate financial professionals of recent developments of interest in financial planning and getting the most out of our financial software tools. These are mini learning sessions that run approximately 30 minutes. See below for a list of upcoming topics…

August 2020	September 2020	October 2020	November 2020	December 2020
6th Debt Consolidation (new capabilities SP)	3rd Connecting with client during COVID (online invite/dashboard)	1st How are you monitoring client outcomes?	12th FAQ	10th RoadMap 2021
20th Risk Tolerance Stability During Uncertain Times (Nicki's Article)	17th Financial Planning and Behavioural Science values	15th TDB	26th Trust coming soon SP	

Register Now: http://training.planplus.com/planplus-planit-learning-circle