



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...

March 2019	April 2019	May 2019	June 2019	July 2019	August 2019
7 th Financial Planning Awards	4 th The Value of Engagement	2 nd Cash Flow is more than budgeting	13 th Reports: Life Planning	11 th Cash Wedge	8 th Practice Management
21 st Frequently Asked Questions	18 th Practice Management	16 th Portfolio Turnover	27 th Reports: Integrated Planning	25 th Introducing SuitabilityPro	22 nd Dear Learning Circle
		30 th Reports: Modular Goals			

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