Jacana LTD
Management Training Consultancy

BELFAST ADVISER OFFICE USER GROUP – 2010 MEETING SCHEDULE

The following meetings will be held at the offices of Kerr Henderson. In all cases the sessions will start promptly at 10.00 am, and are due to finish no later than 4.00 pm.

Date: Wednesday 27th January 2010
Subject: Employer Services & SIPPs
Content:
This will be an in-depth look at the Employer Services module and no experience will be necessary. We will look at adding new employer records and new schemes; how to deal with non-agency group pensions; creating and exporting reports; importing data; and re-broking life schemes. We will also look at the latest position in Adviser Office regarding SIPPs.

Date: Wednesday 24th March 2010
Subject: Client Management – Hints & Tips and Commission & Fees
Content:
The morning session will look at the functionality within Client Management that may not be used frequently, such as separating clients, merging clients, linking records, using the notes, switching schemes etc.

The afternoon session will provide the opportunity for you to ask any questions you have on commissions & fees, including e-commissions. This can include anything from adding the expectation, to matching the receipt to completing the month end process.

Date: Wednesday 26h May 2010
Subject: Adviser Office Forum
Content:
As part of its contact with its client bank, 1st Software is keen for direct feedback from users concerning the system. This session is another opportunity to raise any questions you have about Adviser Office, whether they be function related or technical issues: What would you like it to do which is doesn't already? What would you like it to do better? What bits don't work? All suggestions for improvement, amendments and any unanswered questions will be put to 1st Software for their response at the next meeting.

Date: Wednesday 28th July 2010
Subject: Forum response & User Conference Update
Content:
At this meeting, firstly a representative from 1st Software will provide feedback on the Forum Report issued as a result of the last meeting. They will confirm those areas they will take forward and give reasons for those suggestions that they have rejected.

Secondly, again presented by 1st Software, we will look at the issues covered at the User Conference which is due to take place on the 25th May. This will include an update of the Adviser Office Roadmap.

Date: Wednesday 22nd September 2010
Subject: Financial Scenario
Content:
This will be an in-depth look at the Financial Scenario module, working from an example factfind that will be distributed prior to the meeting. We will look at asset allocation, model portfolios, stochastic modelling and at reporting functionality.

Date: Wednesday 24th November 2010
Subject: AGM plus session to be advised
Content:
Finally, we will hold the AGM which will include a review of the year and the setting of the 2011 meeting schedule. The day will include a training session, which will be decided upon closer to the time.