



UK LEARNING AND DEVELOPMENT SUMMARY

Support For Each Stage Of The Journey



1 Data Entry

[Introductory Learning Track](#)

[Inline help](#)

[Guided Case Study](#)

[Building a case](#)

2 Enter Financial Goals

[Entering Events and Goals](#)

[Guided Case Study](#)

[Inline help](#)

3 Understanding the Charts

[Introductory Learning Track](#)
This includes understanding the assumptions used

[Guided Case Study](#)

[Site map \(Quick start guide\)](#)

4 Creating What Ifs...

...demonstrate your recommendations

[Tax Efficient Decumulation Strategies](#)

...provoke thought

[Gifting Money](#)

...run scenarios the client is considering

[Downsizing a home](#)

[Planning for University](#)

5 Running Insights to....

... stress test the plan

[Market Turbulence](#)

[Inline help on Insights](#)

...instigate discussion

[Annual Savings needed](#)

[Retirement Spending possible](#)

...consider impact of options

[IHT insight](#)

[Life needs insight](#)

[All Insights](#)

6 Presenting the Results

[Case Study – Accumulation](#)

[Case Study – At Retirement](#)

[Introductory Learning Track](#)

7 Generating Reports

[How to create reports](#)

8 Reviews

[Updating a Plan](#)

How would you like to learn?

— [Follow the Guided Case Study](#)

— [Watch a Video](#)

— [Read a Help Topic](#)

— [Inline help](#) – find guides to read and videos to watch whilst building a plan

For further guides and scenarios, visit our [knowledge base](#)

? Where To Start



Where to Start

What this helps you with

Switch on [Inline help](#)

Help at your fingertips when you are entering a case, information on the field you are entering, further reading about how it works, some videos to put it into practice and where to go for further help.

[Guided case study](#)

Work through the guided case study for how to enter your first case into Voyant

[Introductory learning track](#)

Understand what the system is doing and why, including the assumptions and expense fulfilment used

Search our [Knowledge Base](#)

Numerous guides on a variety of scenarios

[Videos](#)

See what you can do in AdviserGo brought to life in the Videos