

## Autumn 2023 Training Academies – Agenda

9:00am	Welcome & introduction. A warm welcome from the Dynamic Planner team. Plus, what to expect over the next three hours
9:10am	Dynamic Planner overview. What can you do today in Dynamic Planner? Are there important features you're missing out on?
9:30am	Dynamic Planner investment solutions research. A masterclass in the system's revamped research. How has it been built? How can it help you deliver good outcomes for your clients?
10:15am	Coffee & networking
10:35am	Dynamic Planner asset management partner. Expert insight. What's happening in world markets today? Plus, latest leading solutions for your clients
10:55am	Short break & seat swap!
11:00am	Group discussion. Three big, financial planning technology questions will be put up for sociable debate. An opportunity to share and learn
11:15am	An overview of latest enhancements in Dynamic Planner. Including, a new dashboard for your firm's clients
11:35am	Answers to your frequently asked questions. Plus, looking forward, what's coming next in Dynamic Planner?
11:45am	Close