







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](#)

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](#)




2 Enter Financial Goals

-  [Entering Events and Goals](#)
-  [Guided Case Study](#)
-  [Inline help](#)

6 Presenting the Results

-  [Case Study – Accumulation](#)
-  [Case Study – At Retirement](#)
-  [Introductory Learning Track](#)

3 Understanding the Charts

-  [Introductory Learning Track](#)
This includes understanding the assumptions used
-  [Guided Case Study](#)
-  [Site map \(Quick start guide\)](#)

7 Generating Reports

-  [How to create reports](#)

8 Reviews

-  [Updating a Plan](#)

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](#)

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