



Connect Client Video Help

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Plencore Online Pty Ltd is a wholly owned subsidiary of Plencore Wealth Ltd and is the online retail section of the company. For additional information about the software, contact Glenis Phillips, the concept designer. (glenis.phillips@financialmappers.com.au or phone Direct Line)

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Introduction

For advisers sharing the software with clients, Financial Mappers has a substantial set of Videos, together with supporting PDS where required.

In addition, Financial Mappers can provide a set of automated emails over the first 90 days to support the client and let them explore features of the Software.

All the videos are found in the Help Manual/Help Videos & Learning Centre. This is the second top section of the Help Manual.

Adviser Resource - Unlisted Videos

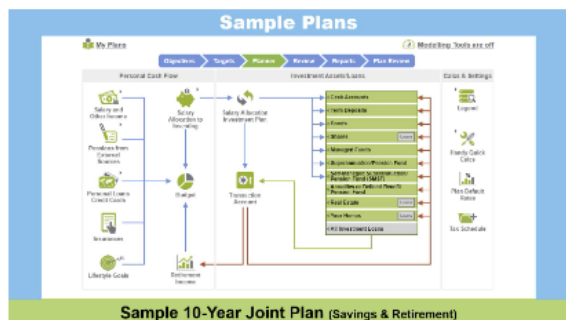
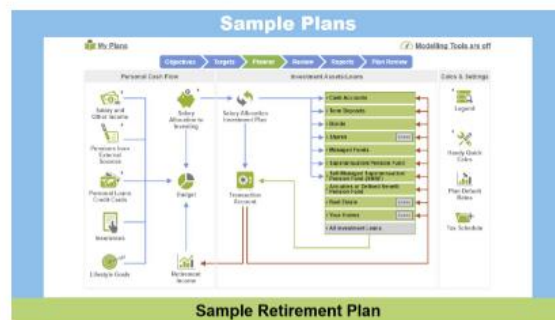
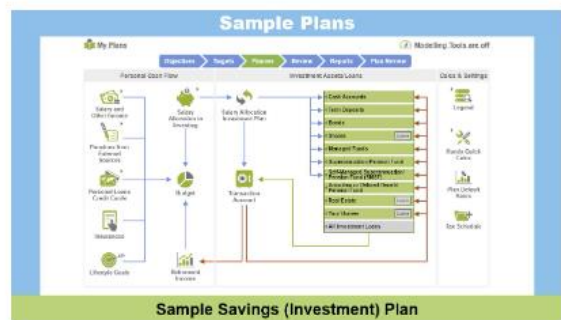
There are two videos that are NOT in the software. If you want to use either of them, you will need to send the link to the client. The reason is that different advisers may have two types of clients they may want to access Financial Mappers. The type of client will determine which video to send.



- Reviewing your Adviser's Plan: https://youtu.be/hamb13tf_hs
- Client Initiating Plan for Adviser: <https://youtu.be/idi9k-ct2Jo>

Sample Plans

While the software has many Sample Plans, videos have been made for these plans. If you your client watches these in order, they should have a complete understanding of how the software works.



The links to these Sample Plans, including the Starting Position) are -

- Sample Savings (Investment) Plan: <https://youtu.be/M-Uq8w1pFk0>
- Sample Retirement Plan: <https://youtu.be/-TcSi27I4Co>
- Sample 10-Year Joint Plan (Savings and Retirement): <https://youtu.be/crMo43yAGOc>
- Sample Debt Reduction Plan (Personal & Home Loans): <https://youtu.be/ggh6Nw0L8OQ>
- The Starting Position and the Starting Position Report: <https://youtu.be/nEPPxyUGnfl>

Tutorials

The software includes Tutorials for your Clients. While these are quite good, advisers may prefer the more detailed information in the *Masterclass Documents*.

Each Tutorial video is supported with a PDF

These are the links to the Tutorial Videos -

- Budget, Transaction Account, and Investment Plan Cash Flows: https://youtu.be/fc_BAQWyDTk
- Interest Earning Accounts: https://youtu.be/corcX_Tcom4
- Shares and Managed Funds: <https://youtu.be/2cAyAggUYfA>
- Real Estate, including Home: <https://youtu.be/s1PeOUZcDbI>
- Superannuation and Annuities: <https://youtu.be/d8spsruQme0>
- Self-Managed Superannuation: <https://youtu.be/VTwIVAU9cmw>
- Retirement Income Streams: <https://youtu.be/bFlem0UA-RE>

- Plan Construction: <https://youtu.be/X3eltoaH21U>
- Modelling Tools: https://youtu.be/jLQjaEaq_fo

Financial Literacy Program

Financial Mappers includes a set of 36 short (2-3 mins) video clips aimed to teach basic financial concepts, using Financial Mappers for demonstration of these concepts where appropriate.

The videos are divided in what we call six lessons

1. Lesson 1: The Basics
2. Lesson 2: Lifestyle Goals & Financial Targets
3. Lesson 3: Debt Management
4. Lesson 4: Financial Concepts from HILDA Report
5. Lesson 5: Investments – Three Major Types
6. Lesson 6: Superannuation

The Basics:

- Compound Interest: <https://youtu.be/GTdHZF1NZ30>
- Investment Returns: <https://youtu.be/4LpBuOg3F5Y>
- Loans and Cash Flow: <https://youtu.be/rrGeZwISdSQ>
- Allocation of Your Savings to Investments: <https://youtu.be/nh5xb-PJPYU>
- Understanding Statistics: <https://youtu.be/mvbK6JcFnis>
- Allocation of Investments to Retirement Income: <https://youtu.be/oxYSHF-eNKw>
- Wrap up of the Basics: <https://youtu.be/Ouznf8V-jAw>

Lifestyle Goals & Financial Targets

- Milestones: https://youtu.be/SlaFje_exAs
- Lifestyle Goals: https://youtu.be/6XTNIHvu_10
- Insurance: <https://youtu.be/M6uq53qXeto>
- Financial Targets: <https://youtu.be/iVVPfWTl-fE>
- Objectives and Strategies: <https://youtu.be/q4vOJEErIsk>

Debt Management

- Good Debt Bad Debt: <https://youtu.be/8j7KAnYY5HQ>
- Credit Card Debt: <https://youtu.be/VSKsyqOtrLY>
- Types of Loan Payments: <https://youtu.be/7VZixzGlmJU>

- Loan Offset Account: <https://youtu.be/ARU0aw2lO94>
- Refinanced Loans: <https://youtu.be/AyoNoO4MSaM>
- Common Debt Ratios: <https://youtu.be/TSbBj2kYggk>
- Interest Rate Risk: <https://youtu.be/j-FR5CVJwlq>
- Credit Score: https://youtu.be/CQ32y_7SBbl

Financial Concepts from the HILDA Report

- Numeracy: <https://youtu.be/h5Vbb6XDqSc>
- Inflation: <https://youtu.be/jEwHwB5PmSk>
- Diversification: <https://youtu.be/cDwYRkINU5k>
- Risk and Return: <https://youtu.be/gm7YR6esPZk>
- Money Illusion: <https://youtu.be/Kb9INLG4ihA>

Investments

- An Historical Perspective: <https://youtu.be/wsWASzLN9g>
- Cash & Fixed Interest Securities: <https://youtu.be/IOW77Is7olc>
- Shares: <https://youtu.be/0iiLCR9v6Kw>
- Real Estate: <https://youtu.be/6ig8WrtIQcl>
- Testing Plan Scenarios: <https://youtu.be/cr4oVlpuWZq>
- Know your Current Finances: <https://youtu.be/s1an6LMnemE>

Superannuation

- The Future of Superannuation: <https://youtu.be/94f2ByyYFaE>
- Accumulation: <https://youtu.be/GaNswvsm66c>
- Drawdown: <https://youtu.be/23RSbEZnFNq>
- SMSF: <https://youtu.be/hDAZQr5cSRM>

Contact

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As the designer of Financial Mappers, Glenis is the most suitable person to answer all your questions about Financial Mappers.

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