CENTREPOINT ALLIANCE

ONGOING FEE AGREEMENT AND FIXED TERM AGREEMENT EFFICIENCIES

MARCH 2023

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New Xplan Training Library
Limitations of using Widgets to track OFA
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Using Advanced Search to track upcoming OFAs
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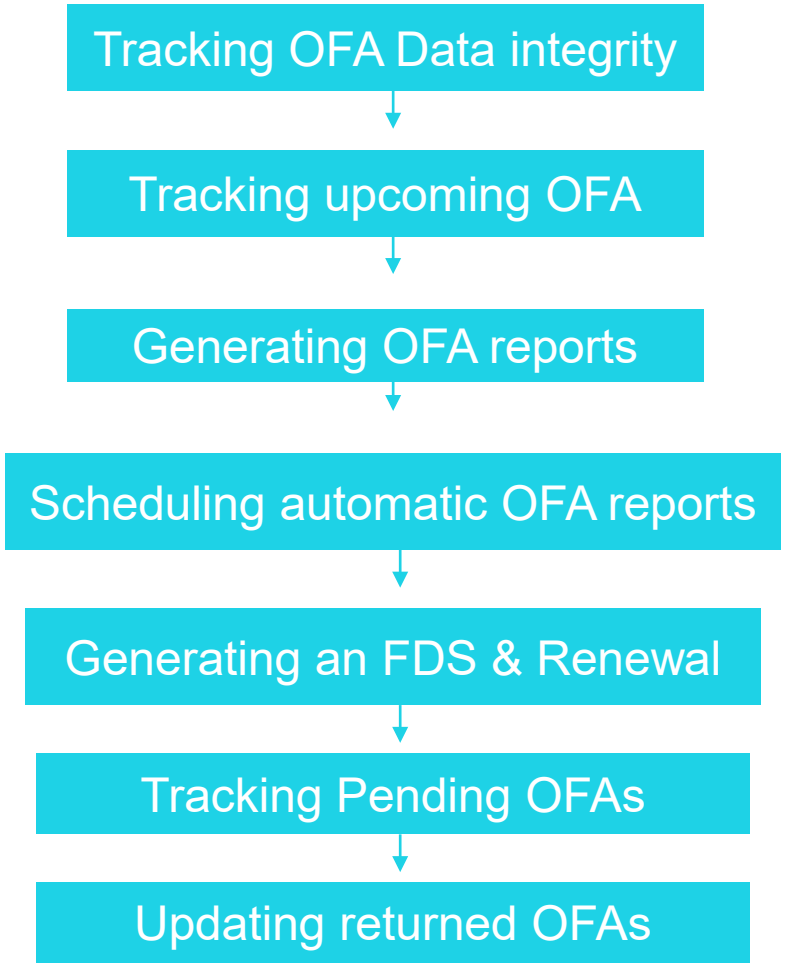
Adviser Preferences
Using the FDS and Consent Builder Wizard
Using Advanced Search to track OFA pending client decision
Updating OFA details

OFA PROCESS FLOWCHART



USEFUL LINKS

CWT | Service Agreement Wizard

CWT | FDS & Consent Builder

Compass | Service Agreement Wizard

Compass | FDS & Consent Builder

Fee Consent via Blockchain for CFS

Compass | Creating Service Package Templates For FDS Builder

CWT | Service Benchmarks

Setting FDS & Opt-In Details Against Clients

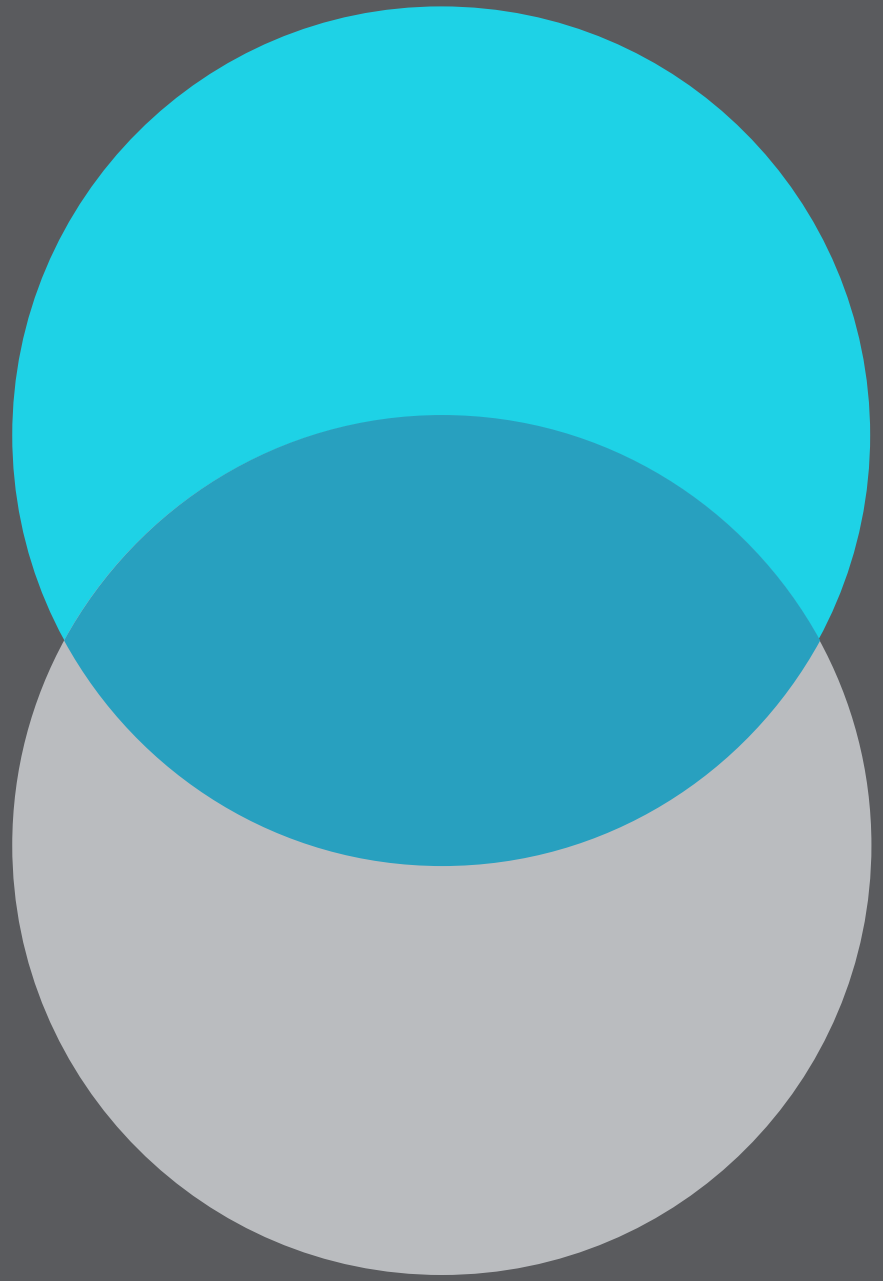
How do I create Advanced Searches?

How do I create a client report using the Xport Tool?

How can I automate a recurring report? (scheduler)

THANK YOU

Questions



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