

## Pensions Profiler Onsite Training

*Overview and familiarisation of Pensions Profiler.*

### Who is it for?

This 3 hour session is aimed at new users and those who want a refresher on how to use Pensions Profiler to benefit their business.

It is assumed that those attending have used the system to some degree (or at least seen the system), have read the User Guide supplied with Pensions Profiler and have a basic grasp of using a computer system.

### What is it about?

The session provides an overview of all the main features of Pensions Profiler. Parts of the training will be delivered with a hands-on approach. Laptops and working examples will be supplied for this.





There will be time available for delegates to ask any questions they may have of the trainer. We endeavour to make the sessions interactive and encourage questions.

Pensions Profiler Professional users will receive an additional 30 minutes training at the end of the session. This will cover how to build custom products and use these in the switching and projection tools.

### What will I get out of it?

The session content will be agreed in advance of the training following an assessment of your needs.

Below is an example of the areas that may be covered:

-  The switching tool.
-  The with-profits review and performance tool.
-  Past performance analysis and charting.
-  Building custom products.

### Further information and how to book

For further information please contact our sales team on 0845 490 1155. O&M reserve the right to refuse attendance and / or rearrange the session.

This session does not constitute compliance advice or consultancy services from O&M. Please refer to your internal processes or speak with your compliance adviser for further guidance.

