

NaviPlan Standard – Live Web-Based Training Schedule

Registering for sessions

To register for any of the below sessions, please contact EISI Sales (888) 692-3474 option 2.

Start Planning module

This fast-paced training session covers enough concepts to get you up and running with NaviPlan Standard software. *There is no cost for this module.*

Start planning

There are no Start Planning sessions currently scheduled.

Core modules

These modules provide you with the skills to create more detailed plans. *Core sessions cost \$50 each.*

Net Worth

Monday May 10 10:00 AM CT

Cash Flow

Tuesday May 11 10:00 AM CT

Retirement goal analysis

Wednesday May 12 10:00 AM CT

Asset allocation

Thursday May 13 10:00 AM CT

Accumulation goals

Friday May 14 10:00 AM CT

Elective modules

Use these modules to learn how to treat unique and sophisticated client cases. *There are no Elective module sessions currently scheduled.* Please feel free to view the elective Training Video Clips at the NaviPlan Standard support site: <http://support.eisi.com/standard>.

Protection planning
Retirement distribution planning
Monte Carlo analysis
Estate objectives and testamentary trusts
Gifting, ILIT's and bequests

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Earn CFP Board-approved CE credits

To earn CE credits towards your CFP designation, please provide your CFP registrant number when you call in to register.

Scheduling your sessions

Each module is covered in 60-90 minutes. All times are provided in Central Standard Time (CST). Please ensure that you block off this time in your calendar

Joining the event

You will receive an email from an EISI Training Specialist two business days prior to your scheduled session. The email contains a link to a login screen that verifies your email address, and then lets you join the event. Give yourself enough time (about 15 minutes before the scheduled start time) to login.

Participating in your sessions

Sessions are delivered via the WebEx online training platform. For system requirements, visit: <http://support.webex.com/support/system-requirements.html>

Cancelling a session

A refund will be provided for cancellations received at least one business day in advance of the session.

Contact us

To find out more about your training options or any of these sessions, contact Training at (888) 692-3474, option 5, or email training@eisi.com.