



Figaro CGT

About the course

The purpose of this course is to provide delegates with a general understanding of the Figaro CGT functionality and a practical application of maintaining clients for CGT purposes. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system.

Course Objectives

On completing the course, the successful delegate will be able to:

- Understand the difference between Average and CGT book costs
- Calculate CGT book costs (post April 2008 rules)
- Configure CGT Allowances within Figaro
- Navigate through the CGT Enquiry screens
- Maintain Client Brought Forward Losses
- View portfolio holdings and transactions
- Identify what fields are pertinent to CGT processing on a portfolio transaction
- Add and delete hypothetical transactions to a portfolio in both the back and front offices
- Understand the information displayed in the Front Office Enquiry CGT Tab

Who should attend the course?

- This course is designed for CGT clerks who already possess a basic knowledge of FIGARO Back Office.
- It is suitable for both new users and those experienced users who have learnt on the job and want to fill gaps in their knowledge

Course Prerequisites

- Delegates should have attended the Figaro Portfolio Management course.

Course Content

Part 1: CGT Overview & Administration

- What is CGT?
- CGT Rules & Calculations
- Figaro CGT Administration
- Figaro Back Office CGT Enquiry

Part 2: CGT - Portfolios & Front Office

- Portfolio Display & Hypothetical Transactions
- Front Office CGT Enquiry & What If
- CGT Reports

Course Details

- Duration: 3 hours
- Course booking reference: **FIGAROV4M8**

Course Venues

Courses can be held at our fully equipped training facilities in London (details below) or delivered on your premises

- JHC Plc, Ground Floor West, Cottons Centre, Cottons Lane, London SE1 2QG

Contacting JHC Plc

For information on booking this course please contact our training department:

- Ph. 0207 367 6534
- Email: training@jhc.co.uk

