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The Process Of Financial Planning: Developing A Financial Plan (National Underwriter Academic)



Synopsis

The Process of Financial Planning: Developing a Financial Plan, Second Edition, builds on four cornerstones: the profession, fundamental tools, the systematic financial planning process, and the plan as a product of financial planning. This edition of the text integrates these cornerstones into a sound educational approach that has been refined to meet the needs of students learning both the process of financial planning and the tasks associated with writing and communicating a plan to clients. The authors, Ruth H. Lytton, PhD, John E. Grable, PhD, CFP®®, and Derek D. Klock, MBA, have organized the text around four main objectives:

- » Basing the financial planning process on foundational concepts central to everyday professional practice
- » The ethical, legal, and regulatory environment
- » Planner-client communication
- » Planner-client decision making

Offering an in-depth and multidisciplinary explanation of the systematic process of financial planning

- » Integrating the systematic process of financial planning with CFP Board of Standards, Inc., Standards of Professional Conduct
- » Providing the background and explanation of the components of a model financial plan, whether comprehensive or modular, to document and guide the process for both advisor and client

In addition, The Process of Financial Planning, Second Edition, includes:

- » Increased focus on CFP Board's Practice Standards, Code of Ethics, and Rules of Conduct
- » Increased focus on the regulatory environment, including a historical review of key legislation that shapes the delivery of financial planning services
- » Additional coverage of the "how" and "why" of writing and communicating a plan to clients
- » Revised Sample Financial Plan section "Education Planning" based on the series of vignettes that bring to life the planning process as told by Tom and Nyla and their planner, Jane
- » Real-world examples and discussions, including fillable forms for use with other cases
- » Expanded teaching and learning aids to help students focus on and retain key information
- » And much more!

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Customer Reviews

Excellent CFP resource.

Came in great shape, no highlighting, no bends, brand new. Didn't come with the excel package my teacher mentioned

Hard. Not as big as the other books. Easier to bind. Some big words. Easy to highlight. No pictures. Fits in a briefcase. Flammable. Paper. analog not digital. Opens when thrown. No value after purchase. Fits on bookshelf.

New text and arrived in excellent condition.

Just what I needed

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