

The book was found

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!

Book Information

File Size: 122722 KB

Print Length: 494 pages

Publisher: The National Underwriter Company; 5 edition (November 9, 2012)

Publication Date: November 9, 2012

Sold by: Digital Services LLC

Language: English

ASIN: B00A4HODKC

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Enhanced Typesetting: Enabled

Best Sellers Rank: #745,453 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #49

in Kindle Store > Kindle eBooks > Business & Money > Industries > Insurance > Life #76

in Kindle Store > Kindle eBooks > Business & Money > Industries > Insurance > Health #147

in Books > Business & Money > Insurance > Life

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

[Download to continue reading...](#)

The Process of Financial Planning: Developing a Financial Plan (National Underwriter Academic)

BUSINESS PLAN: Business Plan Writing Guide, Learn The Secrets Of Writing A Profitable,

Sustainable And Successful Business Plan ! -business plan template, business plan guide - Event

Planner: The Art of Planning Your Next Successful Event: Event Ideas - Themes - Planning -

Organizing - Managing (Event Planning, Event Planning ... and Organizer - How To Guide Books

Book 1) Business Plan: Business Tips How to Start Your Own Business, Make Business Plan and

Manage Money (business tools, business concepts, financial freedom, ... making money, business

planning Book 1) Master Planning Success Stories: How Business Owners Used Master Planning

to Achieve Business, Financial, and Life Goals (The Master Plan Book 2) Measuring the Software

Process: Statistical Process Control for Software Process Improvement Business plan template and

example: how to write a business plan: Business planning made simple Event Planning: Plan Events Like a Professional, Impress Your Clients and be Your Own Boss in 12 Simple Steps (event planning, experience, organise, manage, ... be your own boss, work from home Book 4) Agile Product Management: (Box Set) Agile Estimating & Planning Your Sprint with Scrum and Release Planning 21 Steps (agile project management, agile software ... agile scrum, agile estimating and planning) Event Planning: Event Planning and Management - How to Start Successful Event Planning Business! National Geographic Guide to National Parks of the United States, 8th Edition (National Geographic Guide to the National Parks of the United States) Praxis Core Academic Skills for Educators Exam Secrets Study Guide: Praxis Test Review for the Praxis Core Academic Skills for Educators Tests Marketing and Outreach for the Academic Library: New Approaches and Initiatives (Creating the 21st-Century Academic Library) Commentary for Academic Writing for Graduate Students, 3rd Ed.: Essential Tasks and Skills (Michigan Series in English for Academic & Professional Purposes) Developing Readers in the Academic Disciplines Piano Literature - Book 3: Developing Artist Original Keyboard Classics (The Developing Artist Library) Piano Sonatinas - Book One: Developing Artist Original Keyboard Classics (The Developing Artist) Piano Literature - Book 4: Developing Artist Original Keyboard Classics (The Developing Artist) Secrets of a Financial Aid Pro: Master the College Funding Process and Give Your Child Lifelong Financial Skills Without Losing Your Cool Adventures in Singing: A Process for Exploring, Discovering, and Developing Vocal Potential