



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

Ruth, John

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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's" and "why's" 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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