

1. Record Nr.	UNINA9910813775303321
Titolo	CFP Board financial planning competency handbook // Charles R. Chaffin, editor ; Certified Financial Planner Board of Standards, Inc
Pubbl/distr/stampa	Hoboken, New Jersey : , : Wiley, , 2015 ©2015
ISBN	1-119-64247-7 1-119-09498-4 1-119-09500-X
Edizione	[Second edition.]
Descrizione fisica	1 online resource (945 p.)
Collana	Wiley finance series
Disciplina	32.024
Soggetti	Financial planners Investment advisors Finance, Personal Financial planning industry
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Includes index.
Nota di contenuto	CFP Board Financial Planning Competency Handbook; Contents; Acknowledgments; About the Book; Preface; Notes; About the Practice Questions; About the Contributors; Part One Introduction; Chapter 1 Theory and Practice; Part One; Chapter Introductions; Student-Centered Learning Objectives Based on CFP Board Principal Topics; In Class; Bloom's Taxonomy; Professional Practice Capabilities; In Practice; Part Two; Part Three; Notes; Chapter 2 Function, Purpose, and Regulation of Financial Institutions; Connections Diagram; Introduction; Learning Objective; Rationale; In Class Professional Practice CapabilitiesIn Practice; Rebecca; Janie; Notes; Chapter 3 Financial Services Regulations and Requirements; Connections Diagram; Introduction; Learning Objectives; Rationale; In Class; Professional Practice Capabilities; In Practice; Shaylea; Jorge; Notes; Chapter 4 Consumer Protection Laws; Connections Diagram; Introduction; Learning Objective; Rationale; In Class; Professional Practice Capabilities; In Practice; Sarah; Wilma; Notes; Chapter 5 Fiduciary; Connections Diagram; Introduction; Learning Objective; In

Class; Professional Practice Capabilities; In Practice  
 AmandaChapter 6 Financial Planning Process; Connections Diagram;  
 Introduction; Learning Objectives; Rationale; In Class; Professional  
 Practice Capabilities; In Practice; Prospective Client; Kariga; Notes;  
 Chapter 7 Financial Statements; Connections Diagram; Introduction;  
 Learning Objectives; DuPont System; In Class; Professional Practice  
 Capabilities; In Practice; Patricia; Notes; Chapter 8 Cash Flow  
 Management; Connections Diagram; Introduction; Learning Objectives;  
 In Class; Professional Practice Capabilities; In Practice; Thomas; Joseph;  
 Chapter 9 Financing Strategies; Connections Diagram  
 IntroductionLearning Objectives; In Class; Professional Practice  
 Capabilities; In Practice; Clarence and Robin; Stanley and Simone;  
 Chapter 10 Economic Concepts; Connections Diagram; Introduction;  
 Learning Objectives; In Class; Professional Practice Capabilities; In  
 Practice; Pema; Notes; Chapter 11 Time Value of Money; Connections  
 Diagram; Introduction; Ordinary Annuities and Annuities Due; Even and  
 Uneven Cash Flows; Serial Payments; Learning Objectives; In Class;  
 Professional Practice Capabilities; In Practice; Brad and Emily; Alba and  
 Douglas; David; Note  
 Chapter 12 Client and Planner Attitudes, Values, Biases, and Behavioral  
 FinanceConnections Diagram; Introduction; Learning Objectives; In  
 Class; Professional Practice Capabilities; In Practice; Myra; Myra's  
 Learning Style; Notes; Chapter 13 Principles of Communication and  
 Counseling; Connections Diagram; Introduction; Learning Objectives;  
 Rationale; In Class; Professional Practice Capabilities; In Practice; Haley;  
 Mr. and Mrs. Jones; Notes; Chapter 14 Debt Management; Connections  
 Diagram; Overview; Learning Objectives; Rationale; In Class;  
 Professional Practice Capabilities; In Practice  
 The Home Purchase Decision

## Sommario/riassunto

The official CFP guide for career excellence CFP Board Financial Planning Competency Handbook is the essential reference for those at any stage of CFP certification and a one-stop resource for practitioners looking to better serve their clients. This fully updated second edition includes brand new content on connections diagrams, new case studies, and new instructional videos, and a completely new section devoted to the interdisciplinary nature of financial planning. You'll gain insights from diverse fields like psychology, behavioral finance, communication, and marriage and family therapy to help you better connect with and guide your clients, alongside the detailed financial knowledge you need to perform to the highest expectations as a financial planner. The only official CFP Board handbook on the market, this book contains over ninety chapters that are essential for practitioners, students, and faculty. Whether a practitioner, student, or faculty member, this guide is the invaluable reference you need at your fingertips. Comprehensive, clear, and detailed, this handbook forms the foundation of the smart financial planner's library. Each jurisdiction has its own laws and regulations surrounding financial planning, but the information in this book represents the core body of knowledge the profession demands no matter where you practice. CFP Board Financial Planning Competency Handbook guides you from student to practitioner and far beyond, with the information you need when you need it.