



Planning Fundamentals: Part I

In Part I of the Planning Fundamentals Workshop, you will learn the fundamentals for entering data in the Fact Finder, how to use reports to validate the data you've entered, and enter the facts for a practical client case study.

Planning Fundamentals

9:00 a.m. – 12:30 p.m.

Topics

- Case Study
- Fact Finder Overview
- Data Entry Best Practices
- Introduction to Plans

Next Steps

- Attend Planning Fundamentals Part II.
- Visit eMoney's Help Menu for additional training resources.
- Listen to available webinars in the Intermediate Series, Advanced Series, and Impactful Extras.
- The full Planning Fundamentals course (Part I & II) qualifies for 8 CFP® Continuing Education Credits.

Please Note: This session does NOT include Foundational Planning.

