eMoney

LIVE TRAINING

Comprehensive Planning Workshop: Session B

In this interactive workshop, we will review a fictitious client and spouse's financial situation and create a comprehensive financial plan to help the client achieve their financial goals. We will focus on particular areas of financial planning topics, including insurance and guaranteed income planning, along with investment planning, education planning, and stock options.

Comprehensive Planning

9:00 a.m. – 12:30 p.m.

Topics

- Introduction to Client Case Study
- Life Insurance Planning
- Investment Planning
- Education Planning
- Stock Option Planning
- Fixed Retirement Income Planning (Annuities)

Recommended Prerequisites

- Complete Getting Started Program, Core Concepts Series, and Intermediate Series, & Advanced Series courses
- Attend Platform Essentials, Planning Fundamentals Parts I & II Workshops
- Complete Case Studies found in the Training Tab

Next Steps

- Visit eMoney's Training Tab for additional training resources.
- Listen to available webinars in our Advanced Series and Impactful Extras for continued learning.
- The course qualifies for 4 CFP® Continuing Education Credits.

Please Note: This session does NOT include Foundational Planning.

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