

FChFP 06 - Financial Planning Applications

- 1.1 Introduction
- 1.2 Financial Planning process
- 1.3 Determining Current Financial Situation
- 1.4 Developing Financial Goals
- 1.5 Identify Alternative Courses to Action
- 1.6 Evaluate Alternative Courses of Action
- 1.7 Implement the Action Plan
- 1.8 Review and Monitor the Plan
- 1.9 Financial practitioners role in Financial Planning
- 1.10 Model Client Fact Sheet
- 1.11 Net Worth Statement
- 1.12 Income and Expense Statement
- 1.13 Financial Ratio Analysis
- 1.14 Liquidity Ratio
- 1.15 Loan Repayment to Income Ratio
- 1.16 Surplus Ratio
- 1.17 Investment Assets to Total Assets Ratio
- 1.18 Life Insurance Analysis
- 1.19 Human Life Value Approach
- 1.20 Needs Analysis Approach
- 1.21 Capital Retention Approach
- 1.22 Retirement Need and Investment Analysis
- 1.23 Retirement Planning Case Study
- 1.24 Planning for Other Goals
- 1.25 Preparation of Financial Plan

- 2 Sample Case studies and Financial Plan Construction Workings
 - 2.1 Case Study – 1
 - 2.2 Case Study – 2
 - 2.3 Case Study – 3

- 3 Practice Case Studies
 - 3.1 Case Study – 1
 - 3.2 Case Study – 2
 - 3.3 Case Study – 3