



# Financial Planning: Best Practices Self-Study Webinar (10 Hours)

SO15124B  
SO151

Self Study Webcast  
Dec 20 - Dec 21

## Overview:

In a world moving at warp speed, the ability to filter out the noise and focus on what truly matters is critical to developing a sound financial plan. This self-study webinar will help you to:

- Get your financial plan back on track
- Shore up your ability to achieve your long-term goals and objectives
- Save for your children's education
- Prevent outliving your income

## Objective:

To help accountants and other financial professionals make sound, informed decisions regarding investment and tax planning, asset allocation, portfolio rebalancing, risk management, education funding and retirement planning. You'll be able to combine the lessons learned from the financial crisis with recent legislative and tax law changes to make sound, informed decisions.

[Detailed Learning Objectives](#) [1]

## Emphasis:

- Current investment strategies and market trends
- The five components of proper planning
  - Rainy day funds
  - Special purchase plans
  - Retirement plans
  - Protection strategies
  - Estate planning
- Social Security
- How to talk finances with aging parents
- Taxation of investments and insurance
- Case studies of real-life scenarios

Identify the financial planning process

Recognize the characteristics of a financial plan

Recognize the parameters to select a CFP® professional

Recognize potential conflicts of interest in the financial planning process

Identify the factors that affect financial plans and strategies

Identify the role of a financial planner in planning

Identify the role of a financial planner in the various stages of a client's financial life



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\*Recognize the negative aspects of being left alone in the context of planning

\*Recognize roles of family regarding the individual and the family system

\*Identify the primary services for financial planning

\*Recognize the financial planning process (including) and not following regulatory compliance

\*Identify various characteristics of the role of a planner

\*Identify the role of insurance in planning for financial planning

\*Recognize the role of debt and equities in college planning

\*Recognize the characteristics of college CD plans

\*Identify the role of 529/529A accounts in education planning

\*Recognize the significance of ethics in financial planning

\*Recognize the regulatory issues, trends and pending legislative acts

\*Recognize the characteristics of retirement (deferred pension)

\*Identify retirement products related to equity

\*Identify the characteristics of annuities

\*Identify the characteristics and disadvantages of annuities

\*Recognize the types of fees often associated with annuities

\*Identify the role of life insurance in financial planning

\*Identify life insurance products offering the best value for premium dollars

\*Identify those individuals most likely to benefit from ownership in a life insurance policy

\*Recognize the relative difficulty of the need for disability insurance

\*Recognize the characteristics of long term care insurance policies

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**BottomPrerequisite:**  
None.

**Preparation:**  
No advance preparation required.

**Level of Knowledge:**  
Overview.



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### Links:

[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)