

## **CUSTOMIZED LEARNING**

### **INTRODUCTION TO FINANCIAL PLANNING-2**

Introduction to Financial Planning-2 (IFP-2) will provide you with advanced knowledge of key financial planning strategies. Building on the techniques learned in (Personal Financial Services Advice)™ PFSA™ and Introduction to Financial Planning-1 (IFP-1), students will refine their skills enabling them anticipate the evolving needs of a complex and sophisticated clientele.

IFP-2 builds on the practical knowledge base of a financial planner learned in IFP-1. You will apply financial planning concepts and knowledge to determine the appropriate strategy for clients based on the collection and analysis of client information. By integrating information across the financial planning spectrum you will be able to advise clients on the financial impact of material changes in their life (life events) that could affect their financial future.

Specifically, you will learn about:

- Financial Planning in Canada
- The Six Steps of the Financial Planning Process
- Net Worth Planning and General Strategies to Manage Credit
- Financial Planning and Mortgages
- Investment and Tax Planning
- Retirement Planning and Insurance
- Estate Planning & Family Law
- Financial Planning for Small Business

What's more, completing the FP-2 puts you one step closer to earning the new **Personal Financial Planner™ (PFP)® designation** - APLI®'s newest industry-leading credentials.

#### **WHO SHOULD ENROL**

You should enroll in FP II if you have experience in the financial services field, looking to further advance your career in financial planning by pursuing the new **Personal Financial Planner® (PFP)® designation**.

You have likely completed the **Introduction to Securities Trade™ (IST)™** or the **Global Investment Funds™ (GIF)™** course, followed by the recommended **Personal Financial Services Advice™ (PFSA)™** and **Introduction to Financial Planning-1 (FP-1)™**.

#### **COURSE LEADS TO THE FOLLOWING CREDENTIAL:**

PFP CERTIFICATE

### **FINANCIAL PLANNING-2**

## YOU WILL LEARN HOW TO:

- Explain the importance of the six steps in the financial planning process to clients
- Identify clients financial goals and constraints to develop and customize their financial plan
- Develop a savings plan emphasizing the importance of outlining net worth, cash flow, and saving strategies
- Analyze legal considerations related to property ownership
- Demonstrate the importance of asset allocation and risk management when recommending investment solutions for clients
- Estimate retirement income needs and determine if those needs can be met with the clients available resources
- Explain the benefits estate planning techniques to individuals, families and small business owners.
- Explain the potential impact of life events, such as divorce (Family Law) on the estate planning process
- Develop a financial planning strategy to meet the clients' needs and objectives

## LEARNING EXPERIENCE

APII®'s online learning system helps you meet your study goals. You'll benefit from:

- Interactive resources as well as textbook materials in PDF format.
- Online activities including standalone review questions to help you reinforce your learning and identify topics that may need to be revisited during exam preparation.
- A comprehensive financial planning activity that walks you through the step by step process of preparing and presenting a financial plan.
- Course updates to ensure you're learning the most current and up-to-date practical material in your studies.
- Online assistance from APII®'s academic support specialists.

### Approximate Hours of Study

Hours of Study	110 - 150 hours
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In order to provide some guidance to course participants as to the length of time it will take to be sufficiently prepared to write the final examination, APII® has prepared this estimate of the number of hours an average participant could possibly expect to spend studying for a course. Please note that **these are only recommended hours of study** developed based on research and our course content, however, this does not mean that some students with exceptional backgrounds would not take less time than recommended or that students with no background

at all in finance or economics would not take longer than the maximum. It is important to have a thorough understanding of all of the concepts and mathematical calculations contained in the text prior to attempting the final exam.

<b>EXAM WEIGHTINGS</b> (weightings are approximate)	
Financial Planning Practice	10%
Savings Planning & Debt Management	10%
Investment and Tax Planning	10%
Insurance Planning	10%
Retirement Planning	20%
Estate Planning	10%
Family Law	15%
Financial Planning for Small Business	15%
<b>EXAM INFORMATION</b>	
Exams	1
Exam Format	Paper Based or Computer Based
Exam Duration	3 Hours
Question Format	Multiple Choice
Questions Per Exam	60
Attempts Allowed Per Exam	2
Passing Grade	70%
Assignments	YES
<b>ENROLLMENT PERIOD</b>	
Enrollment Period	6 MOIS

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