CUSTOMIZED LEARNING

INTRODUCTION TO FINANCIAL PLANNING-1

The Financial Planning-1 (FP-1) course is designed to help you deliver the most effective financial plan analysis to your valued clients, based on their personal requirements and provides you with comprehensive knowledge about financial planning. Upon successful completion, you will be able to implement best practices in budgeting, borrowing, constructing and analyzing personal financial statements.

SPECIFICALLY YOU WILL LEARN ABOUT:

- Advising in the Financial Services Industry
- The Financial Planning Process
- Budgeting and Borrowing
- Taxes, Investments, Retirement and Wills
- Risk Management and Life Insurance

What's more, completing the FP-1 puts you one step closer to earning the Personal Financial Planner (PFP®) designation and Certificate in Financial Services Advice - APII®'s industry-leading credentials.

WHO SHOULD ENROL

The FP-1 is designed for individuals with experience in the financial services field, interested in pursuing the new Certificate in Financial Services Advice or the Personal Financial Planner® (PFP®) designation. These individuals have likely completed the Introduction to Securities Trade™ (IST)™ or the Global Investment Funds™ (GIF)™ course and are looking to advance their career in financial planning.

COURSE LEADS TO THE FOLLOWING CREDENTIALS:

PFP® CERTIFICATE

CERTIFICATE IN PERSONAL FINANCIAL SERVICES ADVICE®

CERTIFICATE IN PERSONAL BANKING®

INTRODUCTION TO FINANCIAL PLANNING-1

YOU WILL LEARN HOW TO:

- Consolidate relevant customer information in order to provide quality advice to clients

- Apply broad product knowledge to achieve results for clients
- Recommend appropriate financial solutions
- Build trustworthy and credible client relationships
- Develop methods for improving communication with clients
- Evaluate solutions - pros and cons
- Build and expand your business

LEARNING EXPERIENCE

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

- Learning objectives and goals that keep you focused
- 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
- 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	70 - 90 hours

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.

EXAM WEIGHTINGS (weightings are approximate)	
Advising in the Financial Services Industry	5%
The Financial Planning Process	15%
Budgeting and Borrowing	15%
Personal Taxes	15%
Investments	15%
Retirement Savings	10%
Wills and Estates	10%
Power of Attorney	5%

Risk Management	10%
EXAM INFORMATION	
Exams	1
Exam Format	Paper or Computer-Based
Exam Duration	3 Hours
Question Format	Multiple Choice
Questions Per Exam	80
Attempts Allowed Per Exam	2
Passing Grade	70%
Assignments	YES
ENROLLMENT PERIOD	
Enrollment Period	6 MOIS

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