CUSTOMIZED LEARNING

FUNDAMENTALS OF FINANCIAL PLANNING™ (FOFP)™

APII®'s Fundamentals of Financial Planning™ (FOFP)™ course is ideal for savvy investment professionals who want to specialize further, and expand and maintain their client base. Students will gain a solid foundation in financial planning and a wide range of essential skills including: the intricacies of retirement and estate planning, the principles of ethics and wealth management, and the rigors of tax and personal risk management. Other skills to be gained involve developing more comprehensive budgets and savings plans, and an improved knowledge of family law.

BENEFITS

Course work will help students improve their needs assessment of clients, and develop more effective relationship and financial planning advices. Upon completion of the course students will:

- Demonstrate a greater understanding of current trends in wealth management
- Develop a better understanding of fiduciary duty, trust, agency and code of ethics and family law
- Develop an enhanced understanding net worth and cash management planning and personal risk
- Discern the importance of tax planning and how it affects clients' current and future lifestyles
- Discern the importance of retirement planning and estate planning in the wealth transfer

WHO SHOULD ENROL?

Individuals who have completed the Introduction to Securities Trade™ and Investment Management Techniques Course and aspire to earn the Certificate in Advanced Investment Advice.

Individuals at securities firms and investment management firms who wish to gain a fundamental knowledge of financial planning to complement their investment management knowledge.

GET ON THE PATH TO EARNING THE CERTIFICATE IN ADVANCED INVESTMENT ADVICE

Individuals who have completed the Introduction to Securities Trade™ and Investment Management Techniques Course and aspire to earn the Certificate in Advanced Investment Advice.

ROUTE TO EARNING THE CERTIFICATE IN ADVANCED INVESTMENT ADVICE

IST + INVESTMENT MGENT TECH + FUNDAMENTALS OF FIN PLANNING = CERTIFICATE IN ADVANCED INVESTMENT ADVICE

FUNDAMENTALS OF FINANCIAL PLANNING

LEARN ABOUT:

- Understanding and responding to clients
- Regulatory trends, and investment suitability
- Undertaking budget, savings, and debt planning
- Personal risk management
- Family Law, dealing with separation and child custody
- Tax planning, tax effective investments, tax minimization strategies, and registered plans
- Retirement planning, annuity based financial products and estate planning

What's Included:

- Learning objectives and goals that keep you focused
- Interactive resources as well as textbook materials in PDF format
- Online learning activities including review multiple choice questions to help reinforce your learning of the course materials and to help you identify topics that may need to be revisited while preparing for the exam
- Online assistance from APII®'s academic support specialists

HOW YOU'LL LEARN

This course is taught online and includes a PDF textbook.

Approximate Hours of Study	
Hours of Study	60 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)	
Wealth Management Today and Ethics	8%
Understanding the Client, Cash Flow and	15%

Loans and Mortgages	
Personal Risk Management	10%
Family Law and Tax Planning	22%
Retirement Savings Plans and Employer Pensions, Government Pensions and the Retirement Planning Process, and Annuity Based Financial Products	32%
Estate Planning	13%
Total	100%
EXAM INFORMATION	
Number of Exams	1
Exam Format	Paper Or Computer Based
Exam Duration	1.5 Hours
Question Format	Multiple Choice
Questions Per Exam	60
Attempts Allowed Per Exam	2
Passing Grade	70%
ENROLLMENT PERIOD	
Enrollment Period	6 MOIS

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