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The Process of Financial Planning: Developing a Financial Plan

John E. Grable, Ruth H. Lytton, Derek D. Klock

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The Process of Financial Planning: Developing a Financial Plan John E. Grable, Ruth H. Lytton, Derek D. Klock
As the first publication of its kind, the resources necessary to write effective financial plans are now in one book. Discover detailed, easy-to-follow steps within the systematic financial planning process that lead to meaningful results and allow process management. Loaded with time-saving analytical tools such as sample forms, questionnaires, and worksheets benefiting anyone from a novice to an experienced planning professional
The first and only publication of its kind, The Process of Financial Planning: Developing a Financial Plan, provides a systematic process for how to write financial plans. By systematically working through the plan-writing process itself, you'll learn how to obtain and extract pertinent information, input data, analyze results, make appropriate changes, and present a proposed plan that will carry out your clients' goals. After reading this book, you'll be able to:

Explain and foster sound planning logic and decision-making strategies

Present useful analytical tools - sample forms, questionnaires, and work sheets

Integrate the individual components of a comprehensive financial plan
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