eMoney

LIVE TRAINING

Planning Fundamentals: Part II

In Part II of the Planning Fundamentals Workshop, you will leverage the client case study from Part I to create a comprehensive financial plan and learn how to incorporate interactive planning tools into your planning process.

Planning Fundamentals

9:00 a.m. – 12:30 p.m.

Topics

- Case Study Review
- Reports
- Advanced Planning Scenarios and What-Ifs
- Presenting to Clients with Interactive Tools
- Goal Planner
- Decision Center
- Building Customized and Professional Presentations

Next Steps

- Visit eMoney's Help Menu for additional training resources.
- Listen to available webinars in the Intermediate Series, Advanced Series, and Impactful Extras.
- The full Planning Fundamentals course (Part I & II) qualifies for 8 CFP® Continuing Education Credits.

Please Note: This session does NOT include Foundational Planning.

https://emoneyadvisor.com   training@emoneyadvisor.com   1.888.362.8482