eMoney

LIVE TRAINING

Comprehensive Planning Workshop: Session A

In this interactive workshop, we will review a fictitious client and spouse's financial situation and create a comprehensive financial plan to help the client achieve their financial goals. We will focus on universal financial planning topics, including cash flow, income taxes, retirement planning, and Monte Carlo.

Comprehensive Planning

9:00 a.m. – 12:30 p.m.

Topics

- Introduction to Client Case Study
- Cash Flow Planning
- Income Tax Planning
- Retirement Planning
- Monte Carlo

Recommended Prerequisites

- Complete Getting Started Program, Core Concepts Series, and Intermediate Series, & Advanced Series courses
- Attend Platform Essentials, Planning Fundamentals Parts I & II Workshops
- Complete Case Studies found in the Training Tab

Next Steps

- Visit eMoney's Training Tab for additional training resources.
- Listen to available webinars in our Advanced Series and Impactful Extras for continued learning.
- The course qualifies for 4 CFP® Continuing Education Credits.

Please Note: This session does NOT include Foundational Planning.