

October 2009 Examination - J08 Financial Planning Practice

Syllabus learning outcomes being examined

1.	<ol style="list-style-type: none"><li>1. Be able to establish the advisor/client relationship.</li><li>3. Be able to conduct a fact-find.</li><li>4. Be able to analyse client data.</li><li>5. Be able to formulate the financial plan and make recommendations.</li><li>6. Be able to monitor client circumstances.</li></ol>
2.	<ol style="list-style-type: none"><li>2. Be able to establish client aims, objectives and risk profile.</li><li>3. Be able to conduct a fact-find.</li><li>4. Be able to analyse client data.</li><li>5. Be able to formulate the financial plan and make recommendations.</li></ol>