

October 2009 Examination - J08 Financial Planning Practice

Syllabus learning outcome(s) being examined

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