

July 2011 Examination - R06 Financial Planning Practice

Syllabus learning outcomes being examined

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| 1. | <ol style="list-style-type: none">1. Obtain appropriate client information and understand clients' needs, wants, values and risk profile essential to the financial planning process.2. Synthesise the range of client information, subjective factors and indicators to provide the basis for financial planning assumptions and decisions.3. Analyse a client's situation and the advantages and disadvantages of the appropriate options.4. Formulate suitable financial plans for action and explain and justify recommendations. |
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| 2. | <ol style="list-style-type: none">1. Obtain appropriate client information and understand clients' needs, wants, values and risk profile essential to the financial planning process.2. Synthesise the range of client information, subjective factors and indicators to provide the basis for financial planning assumptions and decisions.3. Analyse a client's situation and the advantages and disadvantages of the appropriate options.4. Formulate suitable financial plans for action and explain and justify recommendations.5. Implement, review and maintain financial plans to achieve the clients' objectives and adapt to changes in circumstances. |
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