

**November 2011 Examination - R06 Financial Planning Practice**

**Syllabus learning outcomes being examined**

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