



Financial Planning - Online

This e-learning course on 'Financial Planning' is designed to help users plan their finances. Basic concepts of financial planning, goal setting, and maximizing assets are discussed. An in-depth discussion of investing strategies is provided, including various instruments suitable for both savers and investors. Also covered are the types of personalities and their investment profiles along with the various stages in the life cycle of an investor. The course also provides strategies for reducing tax burden. In the end, it provides valuable information about how to build a model portfolio that suits your risk and return profile.

This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Access is for 91 days. Certificates with earned credits will be awarded upon successful completion.

También, se ofrece este curso en Español. Llamada para más información.

Targeted Audience

Individuals interested in improving their financial planning skills.

Advance Preparation

No advance preparation required.

Learning Objectives

Students will be able to:

- . Know basic concepts in financial planning
- . Discuss various financial products for savers and investors
- . Understand various types of personalities and their financial needs
- . Recognize your financial goals and achieve them

- . Have better control on taxes you pay
- . Build a finance portfolio suiting your needs

Alumni Comments

"This course was a great experience! Thanks!"

Follow-Up Courses

Estate Planning - Online

Investor Profiling - Online

Trusts and Taxation - Online

Asset Allocation and Taxation - Online

Portfolio Management and Duration - Online

Level: Basic

cfp Credits: 9

icb Credits: 12.5

Detailed Outline

Introduction to Financial Planning

This module provides an understanding of:

- . What is financial planning?
- . Three steps in financial planning process

Duration: 1 Hour

Analyzing the Resources of the Person

This module provides an understanding of:

- . Construction of personal financial statements as a tool for measuring personal wealth
- . The importance of budgeting
- . Evaluation of financial strength by using various ratios

Duration: 1 Hour

Basic Concepts in Financial Planning

This module provides an understanding of:

- . The concept of time value of money
- . Need for diversified investment
- . Investment strategies

Duration: 1 Hour

Financial Products for Savers

This module provides an understanding of:

- . Differences between saving and investment
- . Product choices available for saving

Duration: 1 Hour

Financial Products for Investors

This module provides an understanding of:

- . Product choice available for investment
- . Features of various investment products
- . Difference between various investment products

Duration: 1 Hour

The Psychographics and Life Cycle of the Investor

This module provides an understanding of:

- . The various individual investor types
- . How they are likely to carry out their financial programs
- . Various stages in an individual's life cycle
- . How individuals are likely to carry out their financial programs in these stages

Duration: 1 Hour

Goals and Investment Objectives

This module provides an understanding of:

- . How individuals rationally approach various types of goals
- . The broad investment objectives and how they influence the investment product choices

Duration: 1 Hour

Tax Planning

This module provides an understanding of legal strategies that can be used to reduce federal income taxes such as:

- . Tax-Deferred Retirement Plans
- . Flexible Spending Account
- . Home Equity Loan

. Tax-Exempt Bonds or Mutual Funds
Duration: 1 Hour

Model Portfolio

This module provides an understanding of:

- . Building a model portfolio for an individual
- . Portfolio Allocation Scoring System (PASS)
- . Portfolio Management
- . The Markowitz Portfolio Selection Model

Duration: 1 Hour

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- . Measurement Tools

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Language Options

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For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.