

# Introduction To Financial Planning Module 1

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and the college of financial planners that accounting professionals should not become licensed to sell investments he provides both a strong argument and practical advice on how and why cpas should recommend or sell financial investments he demonstrates that cpas can provide these services to their clients at lower cost than other sources and he rates the pros and cons of a range of investment options and he introduces you to tops trust opportunity pain and solution the low pressure sales method that enabled him to triple his productivity in just one year without jeopardizing his relationship with his clients

describes a systemic process that utilizes such established concepts as organizing engagements gathering client data customizing client analyses developing recommendations preparing client reports and presentations discusses various work programs engagement correspondence checklists and other practice aids which can be used to enhance the financial planning process includes less traditional financial planning concepts such as becoming licensed to offer financial products

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