JO8 Financial Planning Practice – Three Day Workshop

• **Outline**	• The course is a revision workshop • It is assumed that all delegates will have worked through the CII syllabus text p**rior to attending the workshop** • **Running times 9.30am – 4.30pm approximately**
• **Timetable**	**Day One** • **Exam overview** • **Exam techniques** • **Income Tax** ▪ Basic calculation layout ▪ Practice exercise • **National Insurance calculations** • **Capital Gains Tax** ▪ Basic calculations layout ▪ Practice exercises • **Inheritance Tax** ▪ Basic calculations layout ▪ Practice exercises • **Risk** ▪ Different types ▪ Application to asset classes ▪ Risk profiling tools **Day Two** • **Establish client/advisor relationship** ▪ Types/limitation of advice ▪ Advisor methods of remuneration • **Establishing client aims/objectives** ▪ Establishing client's risk attitude • **Fact-finding** ▪ Errors/inconsistencies exercise ▪ Appropriate questions exercise **Day Three** • **Analysing client data** ▪ Identifying gaps in client's current provisions • **Formulating the financial plan** ▪ Revision of protection and investment products ▪ Advantages/disadvantages exercise • **Monitoring client circumstances** ▪ Areas to be reviewed exercise ▪ Appropriate benchmarks