

## CFP Board Financial Planning Competency Handbook

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## **CFP Board Financial Planning Competency Handbook**

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Whether you're studying to become a financial planner, preparing for the CFP® exam, or a practitioner looking for a comprehensive reference to help serve your clients' needs, this is the ultimate guide. Developed by Certified Financial Planner Board of Standards, Inc. (CFP Board), the *Financial Planning Competency Handbook* gives you everything you need to meet the daily challenges of your current or future profession.

# The book comes with access to nearly 400 practice questions online, as well as the option to upgrade to a 28-Credit Continuing Education test for CFP® professionals based in the United States.

This all-inclusive handbook covers the entire list of nearly 90 vital topics on integrated financial planning, including such major components as:

- General Principles of Finance and Financial Planning
- Insurance Planning
- Employee Benefits Planning
- Investment and Securities Planning
- State and Federal Income Tax Planning
- Estate Tax, Gift Tax, and Transfer Tax Planning
- Retirement Planning
- Estate Planning
- Principles of Communication and Counseling
- And more

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