

Stay at the Forefront of your Financial Planning Career



Detailed course descriptions by skill concentration

Holistic Financial Planning

Course Name	Description
Demonstrating your Value	Exploring and communicating the distinct nature and value of holistic financial planning. Learning to develop effective value propositions tailored to the client's needs. Understanding best practices for presenting the terms of engagement
Going Beyond Standard Discovery	Implementing processes, tools, models and frameworks to go beyond a standard discovery. Gathering key client information (quantitative/qualitative), understanding financial planning assumptions and filling in gaps while handling complex client scenarios
Ensuring Analytical Rigour	Applying processes, tools, models, and frameworks, to effectively analyze your client's complex situation. Evaluating specific financial planning strategies and conducting a trade-off or optimization analysis to meet your client's goals
Delivering Effective Recommendations	Developing and delivering effective financial planning recommendations; distilling complex analysis into clear, logical and easily understandable recommendations. Employing strategies to prepare and tailor your discussions to gain client commitment
Enabling Client Success	Enabling client success by ensuring financial planning recommendations are put into action and continue to be appropriate in addressing your client's goals, needs and priorities during the implementation, monitoring and review phases

Course Descriptions (cont'd)

Human Behaviour

Course Name	Description
Building Rapport and Professional Relationships	Recognizing the value of long-term trusted professional relationships in the digital age through the development of strong personal rapport. Learning how to apply Behavioural Economics principles while defining the terms of engagement
Deepening Qualitative Discovery	Gaining a full understanding of your client during Discovery; identifying common pitfalls and optimizing common discovery tools. Learning to recognize and apply Behavioural Economics strategies to address these behavioural issues as they arise
Validating your Analysis	Ensuring your analysis is complete (objective, comprehensive and relevant to the client's goals) by applying Behavioural Economics strategies. Learning how to mitigate common planner biases (i.e., jumping to conclusions) for better client outcomes
Gaining Plan Acceptance	Applying Behavioural Economics strategies to increase the likelihood of implementation of recommendations by ascertaining your client's capabilities and motivations. Delivering the plan in a way that is clearly understood and accepted by your client
Facilitating implementation	Using Behavioural Economics strategies to overcome the "Implementation Gap". Recognizing how monitoring and reviewing your client's plan can strengthen the professional relationship and continue to effect strong positive outcomes

Honesty and Ethics

Course Name	Description
Creating Transparency and Avoiding Conflicts	Exploring common ethical issues in the value proposition and terms of engagement phases. Recognizing how professional obligations can guide your behaviour and decision-making to set the groundwork for developing honest and meaningful client relationships
Identifying Ethical Obligations in Discovery	Identifying and explaining your professional obligations during Discovery. Recognizing the importance of client confidentiality, personal biases and a thorough discovery to serve your clients ethically, honestly, and professionally
Managing Conflicts with Professional Obligations	Learning about scenarios that may arise when analyzing the client's information; discrepancies, conflicting instructions, and situations outside your area of expertise. Applying strategies to provide professionally responsible service to your clients
Building Balanced Recommendations	Developing and presenting planning recommendations that are clear and understandable for clients. Reviewing common ethical considerations, avoiding overstatement and misrepresentation of outcomes, and ensuring alignment to the clients' best interests
Addressing Ethical Issues in Plan Execution	Effectively protecting the interests of your clients by navigating ethical issues that can occur during the implementation, monitoring and review of their financial plan (implementing recommendations, assisting appropriately, and meeting timelines)

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