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The Financial Planning Process The Financial Process that we use is outlined below: 1. Initial Consultation Meeting 2. Discovery Meeting / Factfinding 3. Presenting Solutions 4. Implementing Recommendations 5. Ongoing Review This is process is perpetual. Things always change so adjustments will

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be needed and these should

## *An Introduction to Financial Planning - Loughtons*

Financial Planning ensures that the suppliers of funds are easily investing in companies which exercise financial planning. Financial Planning helps in making growth and expansion programmes which helps in long-run survival of the company. Financial Planning reduces uncertainties with regards to changing market trends which can be faced easily through enough funds. Financial Planning helps in reducing the uncertainties which can be a hindrance to growth of the company.

## *Financial Planning - Definition, Objectives and Importance*

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## *Introduction to Financial Planning - Financial advisers ...*

Financial Planning is an ongoing process to help you make sensible decisions about money, and it starts with helping you articulate the things that are important to you. These can sometimes be aspirations or material things, but often they are about you achieving peace of mind.

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Financial planning is an ongoing process in which it's essential to monitor the progress of your investments within the context of your goals and periodically review all relevant information. It may become necessary to adjust the particular components of your plan in light of changing circumstances and evolving objectives.

## *INTRODUCING THE FUNDAMENTALS OF FINANCIAL PLANNING*

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financial planning. 1. Budgeting . At the basic level of personal finance, budgeting is one of the most important tools you can have. A budget is a plan for how you spend the money you earn.

### *Introduction to Financial Planning*

The Financial Planning process involves 6 steps: 2.Establishing and 2.Establishing and 1.Monitoring the 1.Monitoring the 3.Gathering Client Data & 3.Gathering Client Data & Defining the client- Defining the client- recommendations recommendations Goals Goals Planner relationship Planner relationship The Financial Planner The Financial Planner The Financial Planner should: should: should Discuss his objectives & Analyze information expectations Obtain information & documents Discuss the ...

### *Introduction to financial planning - SlideShare*

to plan for your financial future, you must stop borrowing. Then you can think about financial planning . and growing your wealth. This material will break up the topic of financial planning into six priorities: 1. Insurance 2. Emergecy Savings Fund. 3. Accumulation 4. Retirement. 5. Income 6. Actualization

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The word, "plan", is both a noun and a verb. We see easily that the verb, or the action of planning, comes before the noun, or the "plan". Put differently, the plan is the output of the planning process. Therefore, financial planning is an action or series of actions taken with the intention of producing a comprehensive financial plan. Contained within the plan are more actions to be taken, but these actions are not "financial planning", per se, but rather actions related to your ...

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INTRODUCTION TO FINANCIAL PLANNING. Financial planning is the process of managing your finances in line with your life goals. Life goals can include buying a home, managing your and your children's wellbeing, saving for their education or planning for your retirement. A financial planning process involves gathering your financial information, setting life goals, examining your current financial status and coming up with a strategy or plan for how you can meet your goals given your current ...

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