Financial Planning Practice - R06

Please note that our R06 material has now been updated. The R06 download material for the 2012/13 syllabus (examined post 1st Sept) is now available by clicking on the "Buy Now" button below. CDs are no longer available.

On Download

Price: £40.00

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Size: 9 modules, approximately 4 1/2 hours of material
Download time: approx 6 minutes over high speed broadband
Please note: *After purchase you will receive an email that includes the download link. If this doesn't appear in your inbox within a few minutes please check your spam folder.*

The key areas of each module is shown below.

Module 1 (16 minutes)
R06 a Structure of the Diploma exam | Exam preparation | 6 golden rules for the exam
Module 2 (25 minutes)
Estab The six ISO 22222 principles | financial planning standards | adviser responsibilities | terms of business | the f
Module 3 (28 minutes)
Estab Establishing the client's aims, objectives | six steps of the investment planning process | risk and volatility

Module 4 (31 minutes)
Fact Finding Establishing the client's circumstances: personal details, income, expenditure, assets and existing
Module 5 (39 minutes)
Synthesising and analysing client data Collecting and analysing client data | analysing and summarising client data: cash flow statements, net

Module 6 (19 minutes)
Formulating the financial plan (stage 1) Planning for an adequate income | debt planning | protection planning | risks and limitations of
Module 7 (48 minutes)
Formulating the financial plan (stage 2) Formulating the financial plan (stage 2) | education, pensions, estate and IHT planning | risks and limitation

Module 8 (30 minutes)
Formulating the financial plan (stage 3)

Planning issues: marriage, divorce, death, redundancy | long term sickness and care | function and form

Module 9 (16 minutes)
Cramming The Modules The Modules | summaries from the previous modules