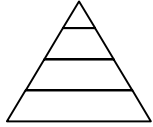


The Comprehensive Financial Planning System™

Case Prep
Manual



Initial supply provided: one
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4. The CFPS Case Preparation Manual

This manual teaches you the **case preparation and technical** skills you need to prepare a true financial plan. It contains essential information to which you will refer every time you work on a case including:

- Tables and Rates (including tax tables)
- Preparing the Plan (82 ideas to consider for every client)
- Generic Recommendations (65 pre-written recommendations)
- Computer Runs (25 spreadsheet programs that provide your client with crucial financial information)