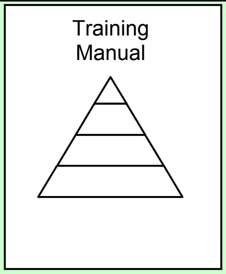
The Comprehensive Financial Planning System™

MANUALS



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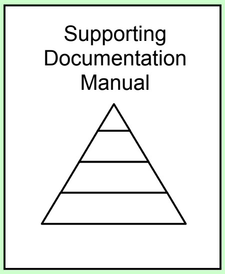
1. The CFPS Training Manual

This manual teaches you the **people** skills you must have to become a successful financial planner. Included in this manual are:

- Telephone approaches that really work
- Sample letters, forms, and brochures
- The CFPS Client Information Form
- How to obtain quality referrals
- How to present and close your case
- Effective record keeping using the CFPS point system



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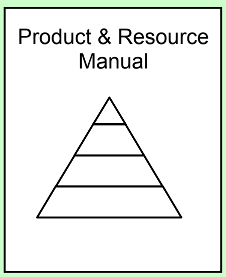
2. The CFPS Supporting Documentation Manual

This manual teaches you the **financial** knowledge you must have to give proper financial advice. It contains 109 pages which can be copied and included in the brief you present to your client. Topics covered in this manual include:

- General Financial Guidelines
- Debt Restructuring
- Upcoming Purchases
- Reducing Outgo
- Creating Cash
- Investments
- Life Insurance
- Other Insurance
- Standard Recommendations
- Self-Employment Recommendations



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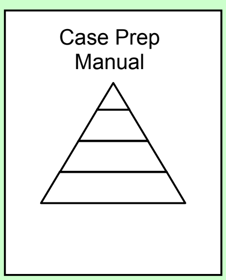
3. The CFPS Product & Resource Manual

This manual teaches you the **product** knowledge you must have to recommend the correct insurance and investment products for your client. Included in this manual is important information on actual products currently available in the marketplace, including:

- Mutual funds (13 different types)
- Insurance products (Life, Health, Disability & Annuities)
- Bank products (mortgage, auto, student & unsecured loans)
- Research and analysis tools (Vital research material you must have in your office)



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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)