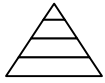


The Comprehensive Financial Planning System™

BOOKLETS

Case Prep
Workbook



1. The CFPS Case Preparation Workbook

You will use this workbook to guide you through the 10 step CFPS case preparation process for each financial plan you prepare. This workbook contains input forms for each CFPS spreadsheet program, checklists, worksheets, and a menu of recommendations from which you can choose.

Initial supply provided: ten
Cost per item to reorder: \$3

Financial Plan
for
Bob and Sherry
Adams



2. The CFPS Sample Financial Plan

This 86 page plan document is based on an actual case which produced amazing results for the client. It is the same case which is used as an example in the CFPS training manual, case prep manual, and video training. You will want to thoroughly study this document and show it to prospective clients as an example of the kind of work you will be able to do for them.

Initial supply provided: one
Cost per item to reorder: \$3