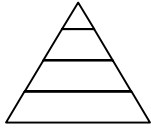


The Comprehensive Financial Planning System™

Product & Resource Manual



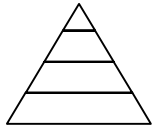
Initial supply provided: one
Cost per item to reorder: \$20

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)

Case Prep Manual



Initial supply provided: one
Cost per item to reorder: \$20

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)