



The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice (National Underwriter Academic)

John E. Grable Ph.D. CFP® RFC, MBA Klock Derek

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The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice, Second Edition, fosters sound planning logic and decision-making using the systematic financial planning process approach. This textbook provides the tools and foundation for preparing a financial plan and provides students with a real-world demonstration of how a financial plan is developed.

The text features:

- » A content review of all of the major subject areas in the financial planning curriculum set in the context of the financial planning process.
- » A variety of case studies:
 - » The Bedo Family Case serves as the foundation for writing a comprehensive financial plan. Questions and discussion related specifically to the Bedo case run through the entire book.
 - » Chapter-based case examples illustrate how financial planning recommendations are developed to help clients meet goals and objectives.
 - » End-of-chapter mini-cases and questions challenge students to apply chapter content.
 - » Quantitative/analytical mini-cases feature multiple-choice questions and answers, designed to develop a student's ability to analyze, evaluate, and synthesize strategies to create appropriate recommendations matched to the clients.
- » A separate ethics case tests knowledge of securities rules and financial planning practice standards.
- » The Financial Facilitator, an integrated Excel financial planning spreadsheet package, "facilitates" analysis and frees the student to creatively model and develop planning strategies and recommendations.
- » Chapter-based learning aids for focus and retention of key information: Key Terms, Learning Objectives linked to end-of-chapter Learning Outcomes, and end-of-chapter Questions and Resource Lists.

And, new and expanded coverage for the Second Edition includes:

- » Revised and expanded content, including PPACA health care and "Planning for Special Populations" featured in every chapter
- » New and expanded cases
- » New and revised student aids in every chapter
- » New "fillable" forms for use with cases

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