

## *Financial Planning Case Studies Solutions*

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## **Financial Planning Case Studies Solutions**

Financial planning case studies will help you understand the process and concept.

### **Case Studies and Results - Bustamante Financial Planning**

George Kinder's approach to life planning is based on the premise that advisers should first discover a client's most essential goals in life before formulating a financial plan, so a client's finances fully support those goals. We call it life planning because what's really important isn't the client's money, but their life.

### **Real life case studies - Financial Planning**

Before the Marcottes begin an investment plan, their personal financial affairs should be in good shape. Several factors they should consider to perform a financial checkup before making their first investment, which is to work to balance their budget, obtain adequate insurance protection, start an emergency fund, and have access to other sources of cash for emergency needs (Hughes, 2004).

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### **Financial Planning Case Study With Solution**

Inside Cases in Financial Planning: Analysis and Preparation are the real stories of how to create a sound client relationship in order to implement a sound financial plan. You'll meet The Burkes, a 100% complete financial planning case with analysis and answers. Plus, there are 10 comprehensive cases that range from easy to hard.

### **Cases in Financial Planning: Analysis and Preparation ...**

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