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Define financial goals, develop financial plans and strategies to achieve goals, implement financial plans and strategies, periodically develop and implement budgets to monitor and control progress toward goals, use financial statements to evaluate results of plans and budgets taking corrective action as required, redefine goals and revise plans and strategies as personal circumstances change.

Personal Finance-Test 1 Flashcards | Quizlet

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Personal financial planning is the process of managing your money to achieve per- ... anticipating expenses, and achieving your personal economic goals. The same process could be continued for a second, third, and fourth year, but the com- Note: The slight differences in answers are the result of rounding.

Personal Financial Planning For Transition Pre Test ...

The exam does not test textbook theories; rather, it assesses one's ability to apply financial planning knowledge in an integrated approach to real-life financial planning situations. Exam Content Beginning with the March 2016 CFP® Certification Exam, a new exam blueprint will be in effect.

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