SILA: Financial Planning Strategies

Course Description

Legal and regulatory changes have created new opportunities for consumers and financial professionals, while at the same time, have greatly complicated the financial services landscape for both parties. An increased number of financial professionals specialize in niche markets to stay competitive, often working in teams, either within or outside of their own company. A full understanding of the client's overall financial situation is a must today. This course focuses attention on the appropriateness and correct usage of the products and strategies described. Topics include:

- The Planning Process
- Life Insurance and Annuities
- Bank Products, Bonds, Securities and Mutual Funds
- Government and Company Benefit Plans