

Financial Plan Tracking –

This program explores techniques to provide ongoing financial and estate plan tracking services to your clients. Recognizing that written financial plans are often viewed as obsolete once presented, this program looks at ways to create a living financial plan that continues to update and provide feedback to the planner and client on goal progress. This program qualifies for CFP Board of Standards CE credits (50 min = 1 hour credit; 100 minutes = 2 hours credits)