



# The Case Approach To Financial Planning

*John E. Grable, Derek D. Klock, Ruth H. Lyttton*

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This unique companion to *The Process of Financial Planning* explains and fosters sound planning and decision-making strategies, using the case study approach. Beginning with an overview of the financial planning process and covering financial computations, cash-flow planning and analysis tools, this resource provides students a real-world demonstration of how a financial planner works.

A top-notch team of authors from leading CFP<sup>®</sup> programs present the planning process in a cohesive format that fills the void in most CFP<sup>®</sup> curricula. By incorporating case study analysis and reviews of the major CFP<sup>®</sup> topic areas, students learn how to utilize data, analyze results, and present a proposed plan that will achieve clients' goals.

- Present useful calculation and analysis tools- sample forms, questionnaires, and worksheets
- Offer core planning topic-specific chapters with planning strategies, advantages and disadvantages, and application to case studies
- Short, quantitative and analytical problems, and several mini-cases
- Analyze a running case throughout the entire text

The text is supplemented with a CD-ROM featuring the Financial Facilitator spreadsheet.

Each Chapter Includes:

Learning Objectives

Chapter Overview

Definitions

Flow Charts

Tables

Exhibits

Planning Tips

Calculations

Additional Resources

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