

April 2024 Examination - R06 Financial Planning Practice

Question No.	Syllabus learning outcomes being examined
1.	<ol style="list-style-type: none"><li>1. Obtain appropriate client information and understand clients' needs, wants, values and risk profile essential to the financial planning process.</li><li>2. Synthesise the range of client information, subjective factors and indicators to provide the basis for financial planning assumptions and decisions.</li><li>3. Analyse a client's situation and the advantages and disadvantages of the appropriate options.</li><li>4. Formulate suitable financial plans for action and explain and justify recommendations.</li><li>5. Implement, review and maintain financial plans to achieve the clients' objectives and adapt to changes in circumstances.</li></ol>
2.	<ol style="list-style-type: none"><li>1. Obtain appropriate client information and understand clients' needs, wants, values and risk profile essential to the financial planning process.</li><li>2. Synthesise the range of client information, subjective factors and indicators to provide the basis for financial planning assumptions and decisions.</li><li>3. Analyse a client's situation and the advantages and disadvantages of the appropriate options.</li><li>4. Formulate suitable financial plans for action and explain and justify recommendations.</li><li>5. Implement, review and maintain financial plans to achieve the clients' objectives and adapt to changes in circumstances.</li></ol>