PCPFP earning Goals and Objectives

Goal 1. Financial Plan Development

Objectives
a. Identify and summarize financial challenges and opportunities for a sample client
b. Prepare a comprehensive plan to achieve goals
c. Devise one or more metrics to evaluate progress toward each goal

Goal 2. Effective Risk Management

Objectives
a. Identify areas of significant financial risk for a sample client
b. Propose appropriate tools to mitigate risks

Goal 3. Written communication skills

Objectives
a. Demonstrate professional writing skills to accurately communicate financial concepts, describe potential risks, and make achievable recommendations