

PCFPF 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