

# Secrets of the CFP Exam Study Guide: CFP® Test Review for the Certified Financial Planner Exam (Mometrix Secrets Study Guides)

CFP® Exam Secrets Test Prep Team

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\*\*\*Includes Practice Test Questions\*\*\*

## Get the test prep help you need to be successful on the CFP test.

The CFP Exam is extremely challenging and thorough test preparation is essential for success. *CFP Exam Secrets Study Guide* is the ideal prep solution for anyone who wants to pass the CFP Exam.

Not only does it provide a comprehensive guide to the CFP Exam as a whole, it also provides practice test questions as well as detailed explanations of each answer.

#### CFP Exam Secrets Study Guide includes:

- A detailed overview of the Certified Financial Planner Exam
- An analysis of general principles of financial planning
- An examination of insurance planning and risk management
- A guide to employee benefits planning
- An extensive review of investment planning
- A breakdown of income tax planning
- An in-depth look at retirement planning
- A thorough review of estate planning
- Comprehensive practice questions with detailed answer explanations

It's filled with the critical information you'll need in order to do well on the test the concepts, procedures, principles, and vocabulary that the Certified Financial Planner Board of Standards Inc. (CFP Board) expects you to have mastered before sitting for the exam.

## The General Principles of Financial Planning section covers:

- Financial planning process
- Code of ethics and professional responsibility
- Bankruptcy code
- Financial services industry

# The Insurance Planning and Risk Management section covers:

- Risk exposure
- Life insurance
- Insurance company selection

## The Employee Benefits Planning section covers:

• Group medical insurance

- Incentive stock options
- Nonqualified deferred compensation

## The Investment Planning section covers:

- Investment vehicles
- Common stock
- Technical analysis
- Taxation

#### The Income Tax Planning section covers:

- Tax compliance
- Income tax fundamentals
- Tax consequences of gain or loss on sale of assets
- Charitable contributions and deductions

# The Retirement Planning section covers:

- Social security
- Qualified retirement plans
- Retirement plans

#### The Estate Planning section covers:

- Probate process
- Gifting
- Trusts
- Postmortem planning techniques
- GSTT

These sections are full of specific and detailed information that will be key to passing the CFP Exam. Concepts and principles aren't simply named or described in passing, but are explained in detail. The guide is laid out in a logical and organized fashion so that one section naturally flows from the one preceding it. Because it's written with an eye for both technical accuracy and accessibility, you will not have to worry about getting lost in dense academic language.

Any test prep guide is only as good as its practice questions and answers, and that's another area where our guide stands out. Our test designers have provided scores of test questions that will prepare you for what to expect on the actual CFP Exam. Each answer is explained in depth, in order to make the principles and reasoning behind it crystal clear.

We've helped thousands of people pass standardized tests and achieve their education and career goals. We've done this by setting high standards for our test preparation guides, and our CFP Exam Secrets Study Guide is no exception. It's an excellent investment in your future.



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