

**January 2025 Examination - R06 Financial Planning Practice**

| Question No. | Syllabus learning outcomes being examined  |
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| 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> |