



Online Course



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FINANCIAL PLANNING – WHAT DO YOU NEED TO KNOW

22, 23 October 2025
09:00 to 11:00 CET

This four-hour lecture will review the traditional financial planning exercise including the integration of the customer's sustainability preferences in the suitability assessment for investment products. Overview of the financial planning process and financial planning subject areas covering the fact-finding process, good practices, client needs, protection, borrowings, saving and investment, pension planning, estate and inheritance planning.

4 HOURS

€ 100