FINANCIAL PLANNING BODY OF KNOWLEDGE TOPIC CATEGORIES

I. TAXATION

1. Assessment Rules
2. Personal Taxation
3. Corporate Taxation
4. Wealth Transfer
5. International Tax Issues

II. INSURANCE

6. Business Insurance
7. Life Insurance
8. Disability Insurance/Income Replacement
9. Health Insurance
10. Critical Illness Insurance (includes Dread Disease and Trauma)
11. Property Insurance
12. Casualty Insurance

III. INVESTMENT

13. Investment Types
14. Investment Structures
15. Types of Investment Risk
16. Measurement of Investment Risk
17. Portfolio Management Techniques
18. Selling and Buying Techniques
19. Performance Measurement
20. Modern Portfolio Theory

IV. RETIREMENT, SAVINGS AND INCOME PROGRAMS

21. Government Pension
22. Government Savings
23. Employer/Employee Programs
24. Personal Retirement
25. Personal Savings

V. LAW

26. Private Law
27. Corporate Law

VI. FINANCIAL ANALYSIS

28. Analysis of Financial Information
29. Personal Financial Ratios
30. Cash Management and Budgeting
31. Personal Financial Statements

VII. DEBT

32. Consumer Credit and Credit Management
33. Mortgages
34. Leases
35. Insolvency and Bankruptcy

VIII. ECONOMIC AND REGULATORY ENVIRONMENT

36. Economic Environment
37. Regulatory Environment

IX. GOVERNMENT BENEFITS PLANS

X. BEHAVIORAL FINANCE

XI. ETHICS AND STANDARDS

38. Code of Ethics
39. Financial Planning Practice Standards