

Risk Management for Financial Planners (Tools & Techniques)



Delivers fundamentals of risk management as a means to complement, benefit, and promote all areas of business planning. With focus on relevant risk management basics, discover that the process involves more than the core activities of making and growing clients assets. The planning process consists of proactively uncovering wealth preservation objectives specific to needs today's practitioner faces. Insurance, PACE, and CFPCE Filed. Comprehensive coverage consists of: Enterprise & traditional risk management Loss control & claims management Alternative risk & contractual transfer Global exposures Disaster planning Broker & vendor relationships

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