

October 2014 Examination – CF5 Integrated Financial Planning

Q	Syllabus learning outcomes being examined
1.	(a) 1. Establish the relationship between the client and the adviser. 2. Gather data.
	(b) 2. Gather data.
	(c) 3. Identify needs and possible solutions.
	(d) 3. Identify needs and possible solutions.
	(e) 4. Make recommendations.
	(f) 4. Make recommendations.
	(a) 3. Identify needs and possible solutions. 4. Make recommendations.
	(b) 3. Identify needs and possible solutions.
	(c) 4. Make recommendations.
	(d) 4. Make recommendations.
	(e) 5. Monitor clients' circumstances.