

## SUMMARY TABLE OF CONTENTS

About the Authors .....	iii
Acknowledgments .....	v
Dedication .....	vii
Preface .....	ix
Abbreviations .....	xv

### Part I: Review of the Process and Computational Skills for Developing a Financial Plan

Chapter 1: A Review of the Financial Process: .....	1
Chapter 2: Computations for Financial Planning .....	15

### Part II: Analyzing and Evaluating a Client's Financial Status to Plan for Client Earnings

Chapter 3: Cash Flow and Net Worth Planning.....	61
Chapter 4: Income Tax Planning.....	81

### Part III: Analyzing and Evaluating a Client's Financial Status to Plan for Client Risk Protection

Chapter 5: Life Insurance Planning.....	109
Chapter 6: Health Insurance Planning .....	133
Chapter 7: Disability Insurance Planning .....	153
Chapter 8: Long-term Care Insurance Planning .....	169
Chapter 9: Property and Liability Insurance Planning .....	191

### Part IV: Analyzing and Evaluating a Client's Financial Status to Plan for the Growth and Distribution of Assets

Chapter 10: Investment Planning.....	209
Chapter 10 Appendix: Modern Portfolio Statistics – Mean-variance Analysis.....	263
Chapter 11: Education Planning.....	275
Chapter 12: Retirement Planning .....	309
Chapter 13: Estate Planning .....	359

### Part V: Financial Planning Case Studies

Chapter 14: Financial Planning Cases .....	403
Case 1: The Zimmer Case .....	407
Case 2: The Ande Case .....	413
Case 3: The Roth Case .....	419
Case 4: The Shim Case.....	424
Case 5: The Butterfield Case.....	429
Case 6: The Little Case .....	444
Case 7: The Cantrell Case.....	449
Case 8: The Alpha Case .....	463
Case 9: The Edwards Case.....	466
Case 10: The Mayfield Case.....	472

Case 11: The Dion Case .....	485
Case 12: The Graham Case .....	490
Case 13: The Tun Case .....	507
Case 14: The Menjivar Case.....	524
Case 15: The Case of the Good Gone Bad .....	528
Case 16: The Maria and Sancho Ruiz Case .....	540
<b>Index</b> .....	<b>565</b>