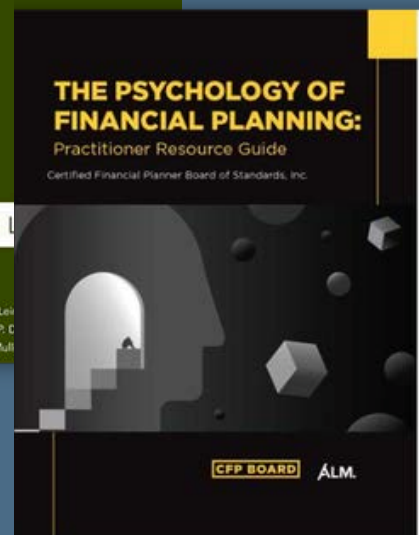
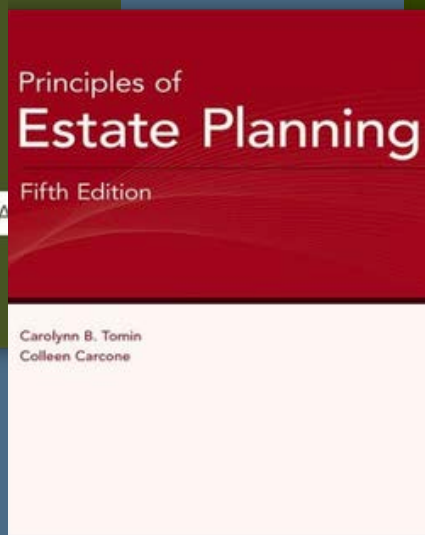
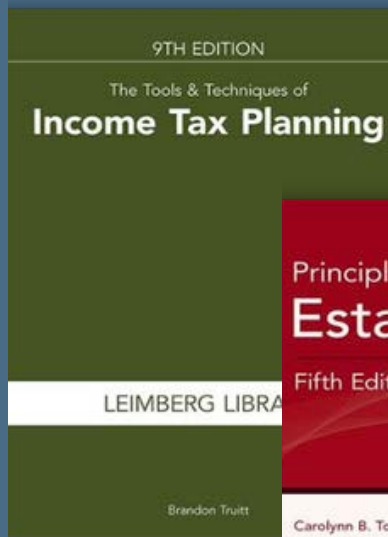


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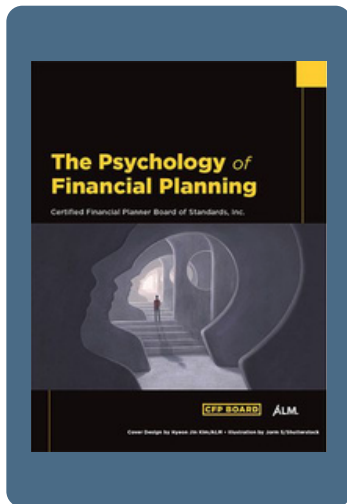
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The Psychology of Financial Planning



The Psychology of Financial Planning is the first title to cover the six Principal Knowledge Topics within the Psychology of Financial Planning domain and assessed in the CFP® exam. Written by subject matter experts under the guidance of the CFP Editorial Advisory Board, this title is available in eBook, digital and print format. *The Psychology of Financial Planning* addresses the theoretical underpinnings for each of the six topics and provides practical guidance, including “In Practice” sections with practice tips and case studies that illustrate how the concepts play out in real-life situations. This pioneering resource will not only serve aspiring CFP® professionals but also assist financial planners in improving their competencies in this area.

This book is structured around the six Principal Knowledge Topics that make up CFP Board’s Psychology of Financial Planning domain:

- Client and planner attitudes, values, and biases
- Behavioral finance
- Sources of money conflict
- Principles of counseling
- General principles of effective communication
- Crisis events with severe consequences

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PART II: BEHAVIORAL FINANCE

Chapter 4: Impact of Cognitive Biases and Heuristics on Financial Decision-making and Well-being

Chapter 5: Client Psychology Barriers in the Financial Planning Process and Strategies for Overcoming Them

PART III: SOURCES OF MONEY CONFLICT

Chapter 6: Building the Client’s Motivation for Achieving Their Financial Goals

Chapter 7: Examining Couple and Family Financial Transparency

Chapter 8: Mediating Financial Conflict

Chapter 9: Facilitating Goal Congruence

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 Format: Paperback, 8½” x 11”
 Page Count: 320
 Retail Price: \$236.00
 Also available as an eBook+Online
 See page 21 for student discount pricing

The Psychology of Financial Planning: Practitioner Resource Guide

The Psychology of Financial Planning: Practitioner Resource Guide is written by financial planning practitioners for financial planning practitioners. Comprehensive, fiduciary financial planning is much more than being competent at financial planning technical skills. In order to maximize a financial planner's value to clients, they must also be able to communicate effectively and deliver recommendations in a way that moves client motivation forward through recommendation implementation. This guide is intended to complement *The Psychology of Financial Planning* by providing financial planners with resources and tools to incorporate the psychology of financial planning into their practice.

Topics covered:

- Understanding risk tolerance, including measuring risk tolerance and the impact of risk tolerance on financial decisions
- How to develop and maintain a successful client-planner relationship, including how to forge a trusting relationship
- How to gather data about clients' goals and values, as well as addressing clients' cultural values
- Understanding how cognitive biases and heuristics impact a client's financial decisions
- Identifying clients' psychological barriers, including pathological financial behaviors such as compulsive buying disorders, hoarding, financial dependence, and financial enabling
- How to build a client's motivation to achieve their financial goals
- Examining couple and family financial transparency, including facilitating goal congruence
- How to recognize and mediate financial conflict
- Identifying financial manipulation and abuse
- Utilizing verbal and nonverbal communication
- How to help your clients navigate change and crisis situations



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Chapter 4: Impact of Cognitive Biases and Heuristics on Financial Decision-making and Well-being

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 Page Count: 196
 Retail Price: \$115.00
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 See page 21 for student discount pricing

Principles of Estate Planning, 5th Edition

C. Tomin | C. Carcone

Principles of Estate Planning covers all aspects of estate planning, written to help students master this complex area and prepare for the CFP® Certification Examination. The authors,Carolynn Tomin, CFP®, and Colleen Carcone, J.D., CFP®, present experience-based guidance from both professional and academic arenas, illustrating common estate planning problems, and fully address all of the CFP® Certification Examination Principal Topics for Estate Planning.

This edition reflects the very latest:

- tax code laws, rates, and exemptions
- changes under the One Big Beautiful Bill, including Trump Accounts, child tax credits and tax rates
- analysis of the income tax considerations that may come into play when developing a client's estate plan



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Chapter 24 Estate Freeze Strategies

Chapter 25 Intra-family and Other Business Transfer Techniques

Chapter 26 Family Limited Partnerships and Limited Liability Companies

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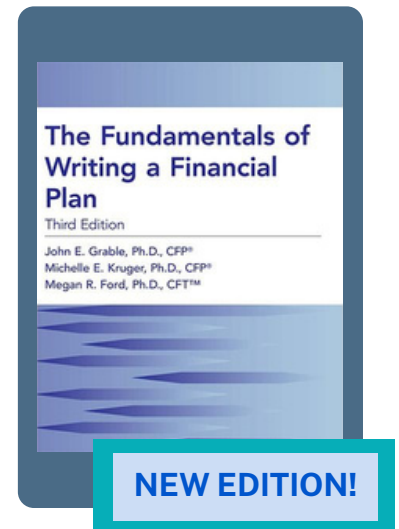
The Fundamentals of Writing a Financial Plan, 3rd Edition

J. Grable | M. Kruger | M. Ford

The Fundamentals of Writing a Financial Plan provides a unique approach to helping aspiring financial planners write a comprehensive financial plan.

Included in this edition:

- A thorough review of the updated seven-step financial planning process.
- A clear explanation of the regulatory and professional environment in which financial planners operate.
- An in-depth discussion of client communication and counseling techniques.
- Planning approaches are adaptable to a wide range of client circumstances.
- A chapter-by-chapter emphasis on analytical tools and evaluation techniques used to assess client data.
- A fully developed example of a complete written financial plan, with explanations connecting analyses to recommendations.
- Chapter-based learning aids, including access to a fully integrated Financial Planning Analysis Excel™ package, eMoney™ applications tied to the Hubble case, and online support materials such as video demonstrations of client communication strategies.
- A new chapter showing detailed eMoney™ inputs, solutions, and possible recommendations.
- Detailed step-by-step guidance on how to carry out calculations that are crucial for developing a financial plan.
- eMoney™ instructional videos available to instructors.



Together, these elements make the third edition not only a guide to writing financial plans but also a practical training resource that mirrors the way financial planning is performed in professional practice.

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Chapter 2 Writing a Financial Plan
Chapter 3 Laws, Regulations, and Ethics: Standards Guiding the Financial Planning Process
Chapter 4 Fundamentals of Communication and Counseling in Financial Planning
Chapter 5 Meet Your Clients
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Product #: 7220003B
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 Also available as an eBook+Online
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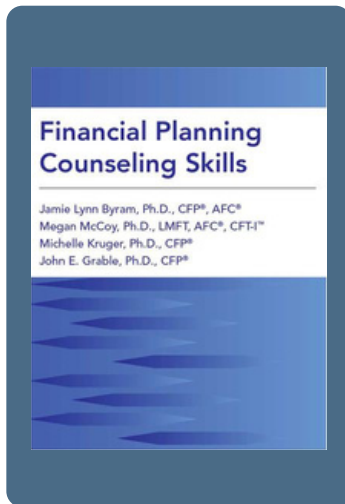
The Comprehensive Financial Planning Bundle: Buy Both and SAVE 25%!

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Financial Planning Counseling Skills

J.L. Byram | M. McCoy | M. Kruger | J.E. Grable



Many of the day-to-day tasks performed by financial planners fall within the broader scope of counseling. Financial planners often face counseling-like incidents in their work. As a result, financial planners need a working knowledge of client and financial planner attitudes, values, and biases. **Financial Planning Counseling Skills** specifically describes how a financial planner can blend counseling, psychological, and behavioral finance theories, models, and approaches into their practice with clients. Discover:

- Chapter Applications that include testing materials, such as short answer questions, essay questions, matching charts and sample interview questions
- A running case study that covers topics from each chapter and applies principles learned
- Charts that demonstrate how an office environment should be structured to positively influence a client's psychology
- Each chapter contains frequent discussion points set off in boxes for easy identification that provide practical guidance on points discussed in the text
- Key terms are highlighted and defined so students can easily find and understand the terms

Topics Covered:

- The application of counseling theory to the practice of financial planning
- Understanding the importance of using theory in practice and demonstrating how a financial planner can use counseling theories to build client trust and enhance client interactions
- How to establish, manage, and maintain client relationships, including how to build a trust-based client relationship
- How to communicate effectively with clients, especially how to obtain deeper insight into a client's values, goals and other valuable information and the importance of nonverbal communication
- Reflective listening skills, including how it allows planners to gain information and understand the entirety of the client's situation
- The importance of questioning skills, including open and closed-ended questions
- The issues with heuristics, or mental shortcuts that allow a decision-maker to process information or make decisions more quickly
- The role of a financial planner in identifying and monitoring client biases and how they impact client decision making
- Sources of money conflict, including areas of potential conflict between spouses and family members, as well as money taboos and differing money personalities
- How financial planners can communicate the importance of agreeing on financial goals and objectives
- Discussion of the most common money disorders, including compulsive shopping, gambling, workaholicism, hoarding, and financial denial, including the symptoms of these disorders and how a financial planner can support clients with these disorders
- Description of relational money disorders, such as parental manipulation and financial enabling
- Discussion of financial infidelity, including the impact of addiction
- How a financial planner can deal with clients' personal crises such as loss and grief
- How financial planners can mediate the impact of financial shocks by providing financial education

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- Chapter 10:** Supporting Clients Through Personal and Financial Crises
- Chapter 11:** Case Study

Product #: 7380000B
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 Also available as an eBook+Online
 See page 21 for student discount pricing

The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice, 6th Edition

J. Grable | M. Kruger

The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice fosters sound planning logic and decision-making. This textbook provides the tools and foundation for aspiring planners to learn by doing, with real-world scenarios that can provide insights into the financial planning process as they put their financial planning skills to the test.

This edition features:

- A content review of the major subject areas typically taught in a college-level financial planning curriculum.
- New and updated content related to cash flow planning, taxes, insurance, investment planning, retirement planning, and estate planning.
- A comprehensive review of important financial planning mathematical formulas and procedures.
- A variety of case studies, including ten-question mini-cases, comprehensive case studies covering topics such as insurance, financial and education planning, and mini-case studies focused on ethics and practice standards.
- Chapter-based case examples that illustrate how financial planning strategies can be developed to meet client-specific needs.
- Quantitative/analytical mini case studies that feature multiple-choice questions designed to develop a student's ability to analyze, evaluate, and synthesize data to create appropriate recommendations matched to a client's needs.
- Chapter-based learning aids, including access to a fully integrated Financial Planning Analysis Excel™ package and other online support materials.
- Financial planning strategies that can be applied to a variety of clients and client circumstances.
- Instructions on how to do calculations essential to creating a financial plan.
- New and revised case studies on topics ranging from the psychology of financial planning to estate planning.

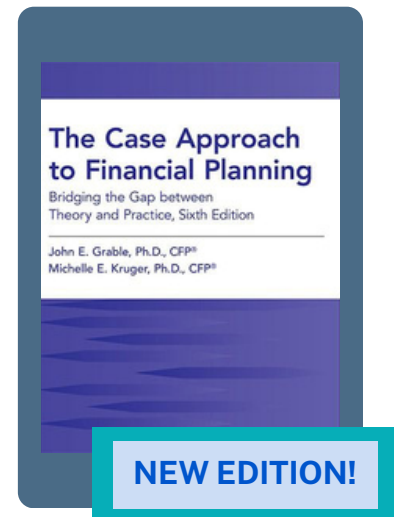


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 Retail Price: \$206.00
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Introduction to Investment Planning, 2nd Edition



M. Keene

Introduction to Investment Planning provides key insights on the theory and practice of investment planning for today's ever-changing academic environment.

In addition to focusing on the basics of investment transactions, this title is structured around the concepts and practices that students are most likely to encounter while taking FINRA's SIE exam. Students will learn about the different types of investment assets, how securities transactions are implemented, and what role advisors play in recommending and executing investment strategies for real-world clients.

Written by experts in this field, this resource:

- Provides a comprehensive introduction to the concepts of investment planning for students at all levels
- Complies with CFP Investment Planning course requirements
- Is designed to help students prepare for the FINRA SIE exam
- Provides introductory-level explanations to help students understand broad concepts without being overwhelmed by technical information

Topics Covered:

- Overview of capital markets and asset classes
- Tools for understanding and measuring investment risk and return
- Portfolio management and investment strategies
- Investment company operations
- Fixed income and equity securities
- Options and hedging
- Alternative investments
- Quantitative calculations, such as present and future values, tax exempt equivalents, and lump sum requirements
- And more! See the "Table of Contents" section for a full list of topics

Every area covered in this book is accompanied by the tools, techniques, practice tips, and examples students can use to help successfully navigate the complex course of investment planning.

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Chapter 2 Asset Classes and Risk

Chapter 3 Trading, Customer Accounts and Prohibited Activities

Chapter 4 Investment Companies

Chapter 5 Investment Risk and Return

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Chapter 8 Options and Option Strategies

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Product #: 2460002
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 Page Count: 402
 Retail Price: \$228.00
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The Tools & Techniques of Financial Planning, 14th Edition

S. Leimberg | C.B. Tomin | W.B. Reeve

The Tools & Techniques of Financial Planning provides complete coverage of the principles, processes, and practice of financial planning. This book is a must-have resource for any planner looking for a well-organized approach to explaining financial planning strategies to clients and evaluating the suitability of the products offered.

This edition features:

- Newly revised chapter on Time Value of Money which includes the basic concepts of TVM and step-by-step calculator instructions to solve TVM calculations
- Expanded coverage of practice standards and ethical considerations, including the 2019 CFP Board Code of Ethics and Standards of Conduct
- Updated insurance and risk management content
- Newly revised health insurance and health cost management topics cover the current marketplace for individuals and small businesses
- New chapter on client communication techniques and additional content on client psychology

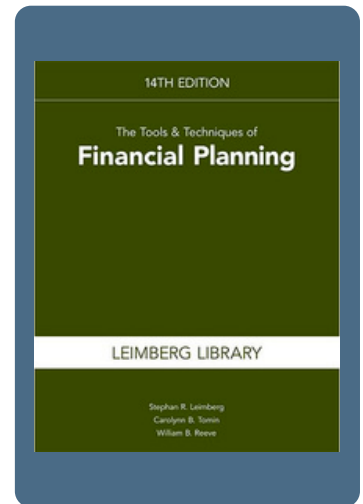


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CASE STUDIES

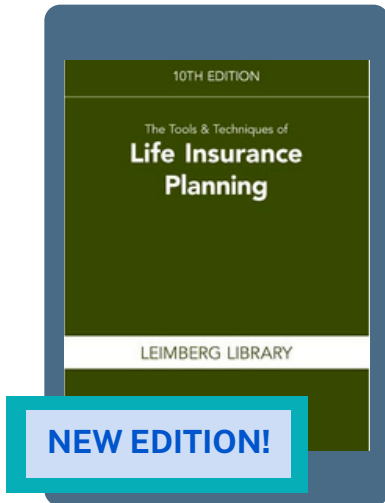
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 Page Count: 652
 Retail Price: \$274.00
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The Tools & Techniques of Life Insurance Planning, 10th Edition

P. Wetmore | K. Buck



The Tools & Techniques of Life Insurance Planning delivers:

- Detailed information about the entire range of life insurance products that can be used by estate and financial planners in a wide variety of circumstances
- Planning techniques for retirement income needs, estate and gift tax avoidance, estate liquidity needs, and long-term care planning
- Plain-language descriptions of the tax consequences of various life insurance products and strategies that planners can use to minimize tax liabilities
- Coverage of advanced topics, such as 1035 exchanges, the transfer-for-value rule, and the use of life insurance products for charitable gift planning

This latest edition includes:

- Reordered chapters to provide an easier to comprehend progression of product design and complexity
- Text has been updated to reflect recent changes to the regulatory environment
- Product descriptions, illustrations, and tables have been revised to include newer product designs
- Discussions of Income and Estate Taxation of life insurance products have been consolidated in chapters devoted to taxes

Added new and enhanced discussion of planning techniques such as:

- Split premium bonus arrangements
- Life expectancy loan regime split dollar
- Generational split dollar
- Spousal lifetime access trusts (SLATs)
- Life insurance retirement plan (LIRP)
- Insured controlled cross-purchase buy-sell arrangement

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The Tools & Techniques of Insurance Planning and Risk Management, 5th Edition

S. Leimberg | K. Price | H. Ogle

The Tools & Techniques of Insurance Planning and Risk Management is designed to help financial planners and other client-focused advisors understand the complex interplay of risk management and insurance planning techniques. It combines an exploration of risk analysis and risk mitigation techniques with a comprehensive overview of insurance planning strategies that are focused on individual and small business clients.

This edition features:

- Updated Cyber Insurance for Business and Personal risk exposures
- The sharing economy and its impact on Business and Personal risk exposures
- Updated content on personal and business auto policies, including coverage for ride-sharing activities
- Updated coverage information for managing healthcare cost risks for individuals and businesses, including ACA mandates, disability, and long-term care policies
- All new Instructor Materials: test banks, PowerPoints, learning objectives and more.

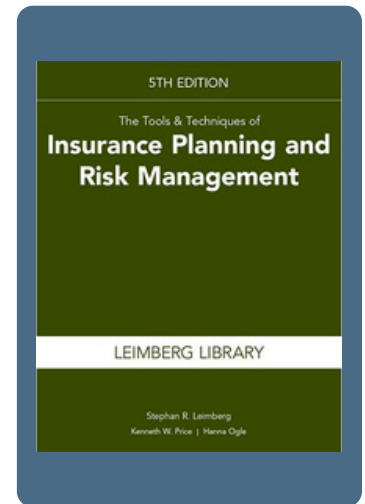


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The Tools & Techniques of Investment Planning, 5th Edition

S. Leimberg | M.P. Daly | T.J. Mulligan



The Tools & Techniques of Investment Planning is an easy-to-read desktop companion for financial planning practitioners. It demystifies the process of investing by providing practical insights into the strengths and weaknesses of different investment approaches and asset classes, and highlights strategies for managing portfolios in the contemporary investment climate.

What's New in This Edition:

- The latest tax changes associated with SECURE Act 2.0, the SECURE Act and the Tax Cuts and Jobs Act, including the tax and beneficiary rule changes and how those changes apply to the investment activities of individuals, trusts, estates, and IRA beneficiaries
- Tax and planning updates under SECURE Act and SECURE Act 2.0, in particular changes on IRA beneficiary planning strategies that were removed
- New content around Portfolio Management Strategies, including Environmental, Social, and Governance investing, as well as Market Cycles, Sector Rotation investing, and Core-Satellite approaches
- Tax rate, capital gain, and tax structure updates with 2024 numbers
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The Tools & Techniques of Income Tax Planning, 9th Edition

B. Truitt

With the passage of the SECURE Act in late 2019, the SECURE Act 2.0 of 2022 and the One Big Beautiful Bill Act in 2025, financial advisors, planners, and insurance professionals are in need of up-to-date, reliable tools and expert insights into income tax planning techniques.

New in the 9th Edition:

- Updates throughout the material regarding the One Big Beautiful Bill Act
- Details on IRS and DOL regulatory changes
- Updated advice on retirement planning issues, the unwinding of COVID-19 legislation, and changing RMD withdrawal and penalty requirements
- New plan contribution and catch-up provisions, including updated student loan matching options and Roth contribution options for SEP and SIMPLE retirement plans
- Updated plan and IRA distribution options including new 10% penalty waivers, and new withdrawal types for domestic abuse, family emergencies, 529 Roth conversions, and more
- Litigation updates
- And more!

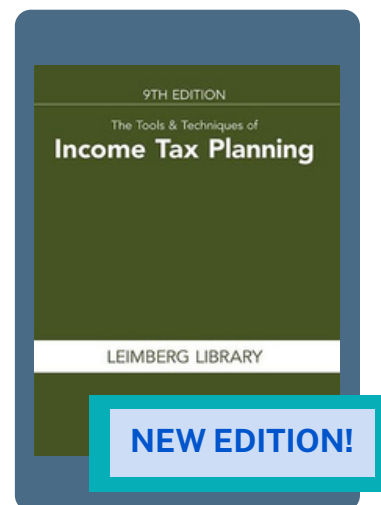


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The Tools & Techniques of Employee Benefit and Retirement Planning, 19th Edition

Joseph F. Stenken

The Tools & Techniques of Employee Benefit and Retirement Planning applies the trusted Tools & Techniques approach, enabling students to grasp even the most complex employee benefit and retirement planning processes.

What's New in this Edition:

- Updates to all numbers with the latest 2026 inflation adjustments from the IRS
- Revisions to the Social Security numbers to include 2026 figures
- The latest guidance on the employee retention credit under the CARES Act
- New details on use and rollover of medical and dependent care FSA plans
- Updated ERISA compliance and reporting requirements, including Form 5500 information
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The Tools & Techniques of Estate Planning, 22nd Edition

L. P. Hood, Jr. | E. Morrow

The Tools & Techniques of Estate Planning teaches students the tools and techniques that every estate planner, financial planner, and insurance professional needs to help their clients manage assets under current law. Students will learn how to plan every aspect of an estate, including tax, investment, insurance, and estate administration decisions within a wide variety of estate types and specific circumstances.

There have been several updates in tax legislation, many of which affect estate planning. When rules change, every estate planner must stay completely up-to-date with all the opportunities — and pitfalls — arising from the new legislation. **This edition features:**

- Changes related to the One Big Beautiful Bill Act
- SECURE Act 2.0 Proposed Regulations and SECURE Act 2.0 changes
- Chapter 32, Spousal Lifetime Access Trust (SLAT)
- Chapter 35, Beneficiary Deemed Owner Trusts
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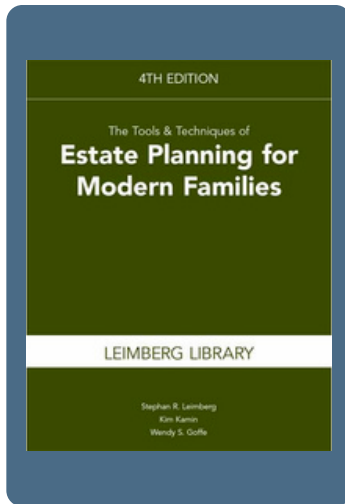
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See page 21 for student discount pricing

The Tools & Techniques of Estate Planning for Modern Families, 4th Edition

S. Leimberg | W. Goffe | K. Kamin



Since before the country was founded, the traditional notion of an American family was understood to mean a heterosexual couple who married until death did part them, who naturally conceived and then raised their own children, and whose children would be expected to repeat the same pattern. However, evolving social norms and technological advances have challenged traditional notions of family and how estate planning advisors must consider their clients' needs. Broadly stated, these considerations include aspects such as: (i) changes due to marital and relationship status, (ii) gender norms and identification, (iii) various paths to parenthood, (iv) longer lifespans, (v) globalization, and (vi) technology.

The 4th edition adds chapters addressing critical topics:

- Planning for Racial and Ethnic Diversity
- Planning for Religious Differences
- Planning for Addiction and Mental Health
- Planning for Contemporary Ethical Considerations

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The Tools & Techniques of Trust Planning, 4th Edition

S. Leimberg | J. Gopman | M. Sneeringer

The Tools & Techniques of Trust Planning, 4th Edition provides advisers with the most up-to-date information about the creation, administration, and modification of trusts for legal and estate planning professionals. Not only does this title deliver an expert overview of general trust information, but it explains how to use specific types of trusts to solve unique planning problems. Explorations of different types of trusts include detailed knowledge about:

- The types of trusts that are most commonly used
- How each type of trust came to be used
- The possible tax consequences for grantors and beneficiaries of using a particular type of trust
- The requirements for each type of trust and how they should be drafted
- How planning professionals such as attorneys, accountants, investment advisers, and trust officers should administer the trust to achieve the client's stated planning goals over the life of the trust



This edition features:

- A chapter on the Spousal Lifetime Access Trust (SLAT), including the advantages, disadvantages and potential uses as well as important planning pointers in the design, funding and administration of a SLAT
- Updates on Special Needs Trusts, including how the Special Needs Trust Fairness Act allowed an individual with a disability or their agent under a power of attorney to establish a d(4)(A) trust for that individual's benefit
- Updates to Community Property law, including a discussion of "full" basis step adjustment and an update on the states that permit a couple to create a community property trust
- The latest on domestic asset protection trust legislation including a discussion of each of the states, with an introductory focus on Alaska and Delaware, followed by a brief overview of each of the other DAPT states, including the new legislation in Connecticut, Indiana and Alabama
- Updated information on trusts and divorce, including how, since passage of the Tax Cuts and Jobs Act of 2017, some states have decoupled from the federal income tax rule regarding alimony.

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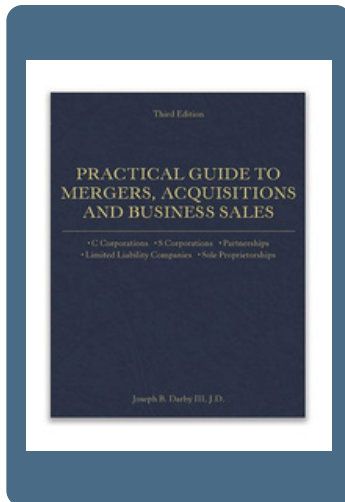
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Practical Guide to Mergers, Acquisitions and Business Sales, 3rd Edition



J. Darby

A must-have for financial advisors and other professionals advising clients on the buying and selling of a business, ***Practical Guide to Mergers, Acquisitions and Business Sales*** succeeds in its mission of teaching its readers how to pare the tax costs of transactions to the absolute minimum, as well as how tax liabilities can be negotiation tools for buying or selling a business.

Drawing on more than 30 years of experience, the expert author, a business and transactional tax law expert, incorporates insightful, real-life examples throughout his coverage of the buying and selling of all forms of business entities, including Sole Proprietorships, Partnerships, S Corporations, C Corporations, Limited Liability Companies, Professional Corporations, and more.

Broad in scope, with numerous citations to the IRS Code, rulings, and regulations, this resource covers:

- How tax aspects of the sale of a business can influence negotiations, both in a positive and negative way
- The areas for “give and take” in any negotiation of tax liability for the sale of a business
- Strategies related to Installment Sales, Contingent Payments, Goodwill, Consulting Agreements with prior owners and other methods that can be introduced into a business acquisition
- Common pitfalls in the negotiation process, including the overlooking of critical tax issues

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Financial Planning for Senior Clients

D. Schilling

Retirees, or those nearing retirement age, have special financial planning needs. In order for financial planners to effectively design plans for seniors, they need to develop an elder care perspective, making sure that not only are their finances healthy, but that healthcare, government benefits, and insurance will be available. ***Financial Planning for Senior Clients*** is an easy-to-understand guide that addresses the myriad of issues that must be considered when advising these older clients.

Financial Planning for Senior Clients not only examines financial, tax, insurance, and estate planning considerations, it also provides guidance on healthcare choices including Medicare and Medicaid, and housing options, such as assisted living and long-term care. The guide also addresses issues pre-retirement, such as the timing of retirement, when to claim Social Security benefits, and tax issues around IRAs and 401(k)s. Also covered are the latest laws, such as the required minimum distribution changes and other effects of the SECURE Act. Case studies provide real-world examples of the types of issues that retirees and their families face and how to address them.



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Offering a full range of educational resources in the areas of Employee Benefits, Estate Planning, Financial Planning, Income Tax, Insurance & Risk Management, and Investment Planning, NUCollege provides online materials that improve preparation, performance, and results — both in the classroom and far beyond.

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- The Tools & Techniques of Estate Planning
- The Tools & Techniques of Estate Planning for Modern Families
- The Tools & Techniques of Trust Planning

» Financial Plan Development

- The Fundamentals of Writing a Financial Plan
- The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice

» Financial Planning

- The Tools & Techniques of Financial Planning
- The Psychology of Financial Planning

» Income Tax Planning

- The Tools & Techniques of Income Tax Planning

» Insurance Planning

- The Tools & Techniques of Life Insurance Planning
- The Tools & Techniques of Insurance Planning and Risk Management

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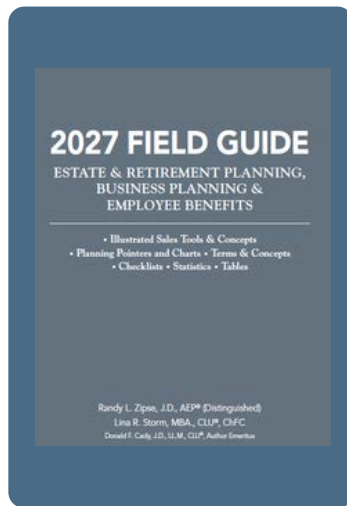
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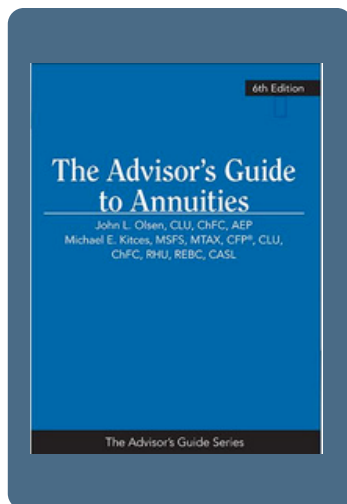
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