

Financial planning advice should theoretically cover the four aspects provided for by the Law of 25 April 2014, i.e. civil law, tax law and taxation, social security and socio-economic security, and the economic and financial environment.

Any request by the client that his situation not be the subject of a multidisciplinary analysis covering all four aspects must be noted in the agreement.

A system whereby the client ticks the boxes indicating the excluded aspects should be used with caution. It is better if the client him- or herself indicates which aspects to exclude from the financial planning advice.

The client should in any case be aware that the service provider must explain all four aspects of financial planning advice. It is then up to the client to decide whether to restrict the scope of the financial planning advice.

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