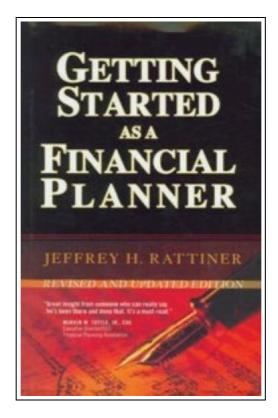
Getting Started as a Financial Planner (Revised and Updated Edition)



Filesize: 5.46 MB

Reviews

Basically no words to clarify. Of course, it is perform, still an amazing and interesting literature. Its been printed in an exceptionally basic way which is only soon after i finished reading through this ebook where actually altered me, change the way i really believe. (Newton Runolfsson)

GETTING STARTED AS A FINANCIAL PLANNER (REVISED AND UPDATED EDITION)



Viva Books, 2006. Hardcover. Condition: New. 5th or later edition. There has never been more opportunity for financial planners-or more reasons for financial professionals to consider switching the direction of their careers into this lucrative field. Today?s planners will cash in on the huge surge of baby boomers preparing for retirement in the decades ahead. And as the number and complexity of investments rises, more individuals will look to financial advisers to help manage their money. In this updated guide, Jeffrey H. Rattiner, a practicing financial planner and educator, provides a complete, systematic, turnkey framework for the aspiring planner to follow. Starting from the key question, "Why do you want to be a financial planner?" the author guides you through the development of an effective infrastructure and client management system for your practice. The many essential concepts are clearly illustrated with examples from practicing professionals. Throughout this handbook, Rattiner provides personal insights on how and why you must develop a solid understanding of client needs before you can build a comprehensive financial plan. Getting Started as a Financial Planner has everything you need to know - from how to set up a practice and communicate with clients to how to manage investments and market your services-in order to launch your career in financial planning and to guide you,to success in this high-growth profession. Contents: The World of Financial Planning? Describes who is attracted to the field, the origins of financial planning, and recent trends in the industry? Foundations of a Financial Planning Career? "Ten Must-Do?s" for structuring? A successful financial planning business? Developing a Client Management System? PIPRIM, a client management system that will help planners develop a comprehensive financial consulting practice? The Spectrum of Financial Planning? An overview of the many...



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