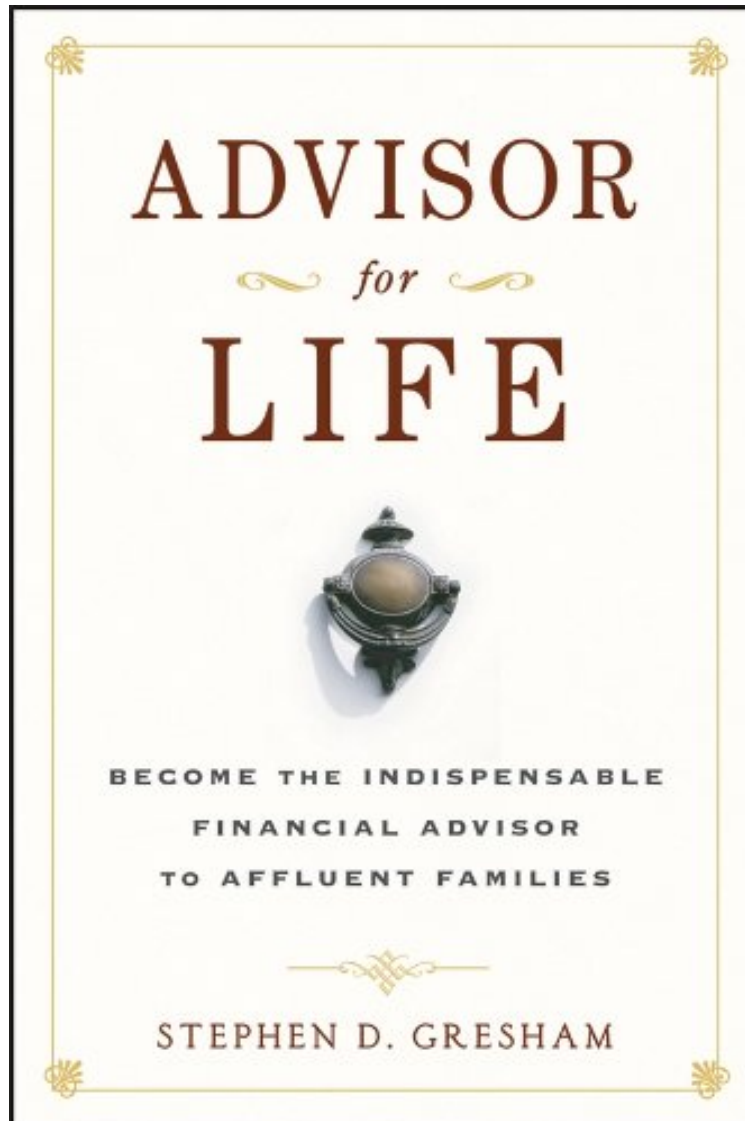


[E-BOOK] Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families

Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families

Stephen D. Gresham

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before purchasing it in order to gauge whether or not it would be worth my time, and all praised Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families:

10 of 10 people found the following review helpful. Not for beginners
By Trevor Smith
I bought this book because i was thinking about becoming a financial advisor. A lot of the advise is outdated (the author speaks about the business practices of Ford and GM with high praise, while not referencing other companies or industries). Perhaps if I was

currently a financial advisor and i needed to finetune my approach this would be a good book to read, but it does nothing to inspire or help you get your practice off the ground. Conclusion: if you're a financial advisor with a few years of experience, but you think your list of clients has room to grow, this is the book to read. If you're starting out i would stay away.0 of 1 people found the following review helpful. Layman FollowerBy Layman FollowerA very informative book that is real easy to read and follow. I AM NOT an investment advisor, rather I bought this book to help me determine how best to evaluate such an advisor for future engagement. I found it outstanding as a tutorial as to what to look for, and what to run from. It yields very good counsel.Most middle/high income people should have a financial advisor, even those of us who are well educated and experienced with the business world, investments, balance sheets, etc. Selecting a good advisor is very, very critical. This book adds a lot of value to that selection process, and I believe could well save the reader thousands and thousands of dollars and many nights of insomnia.From my standpoint this book offers good value to anyone even just thinking of engaging an investment or financial advisor.0 of 0 people found the following review helpful. Not just for FA's but also for clients.By Jacob CampbellObviously a great read for financial advisors - start building a solid practice from day one. Clients should pick this one up as well. Knowing what to ask when to ask builds a strong relationship.

"The Age Wave of retiring baby boomers is creating a seismic bonanza for financial advisors--if they can provide the kinds of creative and flexible strategies their clients will be wanting and needing. Steve Gresham provides the solid, imaginative, yet practical guidance needed to build winning strategies to meet the needs of a new generation of investors. I have long respected his work and heartily recommend this book." --Ken Dychtwald, PhD, founder and CEO, Age Wave, and author of Age Wave, Age Power, The Power Years, and Workforce Crisis "Steve Gresham showed us in The Managed Account Handbook that the basics to a successful advisor do not differ from one country to another. In this book, he is expanding his horizon with his extensive experiences to further help you to develop the skills for building a devoted client base. This is the must-read book for all who want to succeed in the financial advisory industry." --Toshiya Shimizu President and CEO, Nikko Cordial Advisors Ltd. "For thirty years, advisors have been using wealth accumulation as their main sales weapon. With the boomers entering retirement, all that's out the window. Now the imperatives are income distribution, planning--making sure the investor does not run out of money. In Steve's newest book, he does an excellent job of walking advisors through this change and showing them how to alter their practices to not only survive but thrive. This is a must-read for any advisor who still wants to be in the business in ten years." --Len Reinhart founder and President, Lockwood Advisors? "For over thirty years, I have sought advice from industry experts who can help me grow and optimize my practice. Steve Gresham's advice is always of interest to me--he is always right there on the cutting edge." --John Rafal, President, Essex Financial Services Registered Rep.'s Top 50 Financial Advisor for 2006 and Barron's Top 100 Financial Advisor "A good coach can help even the best players reach their potential. As a financial advisor, you coach successful families to tackle life's challenges and achieve their goals. Steve Gresham can help--he has the tactics to help you build a winning team." --Mike Krzyzewski Head Coach, Duke University Basketball and the 2006 U.S. National Team

From the Inside Flap If you intend on becoming a financial advisor to today's affluent families--especially those within the baby boomer generation--you need to provide them with guidance so thorough, insightful, and valuable that it will allow you to stand out from the rest of the financial professionals in this field. Advisor for Life can help you do this and much more. Going far beyond everyday investment issues--such as setting a client's investment goals, selecting complementary investments, and monitoring portfolio balance--this practical guide will help you truly understand your clients' needs and develop a personalized plan that will allow them to live financially secure and fulfilling lives. Industry visionary Steve Gresham has extensive experience in the world of wealth management, and with Advisor for Life, he wants to share those experiences with you. Within these pages, Gresham not only shows you what it takes to run a financial advisory practice geared towards affluent families, but he also reveals how an "advisor for life" should properly protect, motivate, and educate clients over the course of the relationship. Divided into four comprehensive sections, Advisor for Life opens with a detailed discussion of the opportunities available within the industry, and then moves on to outline the essential elements of wealth management. Topics covered include: Developing a compelling investment philosophy and establishing an effective process that will guide the investment decisions you make for your clients Managing a client's fears and dreams when dealing with new wealth, retirement expectations, and the impact of taxation Helping affluent families pass wealth on to their heirs by sorting through the emotions that often entangle spouses, adult children, and aging parents Conveying your expertise, experience, and value proposition to existing clients, affluent prospects, and critical referral sources Creating a framework to optimize the value of a financial advisory practice And much more Delivering a consistently superior level of service to an affluent client base is the only way to survive and thrive in today's competitive financial advisory business. Filled with in-depth insights, informative examples, and engaging case studies, Advisor for Life will show you the best ways to successfully serve today's most affluent clients. From the Back Cover "The Age Wave of retiring baby boomers is creating a seismic bonanza for financial advisors--if they can provide the kinds of creative and

flexible strategies their clients will be wanting and needing. Steve Gresham provides the solid, imaginative, yet practical guidance needed to build winning strategies to meet the needs of a new generation of investors. I have long respected his work and heartily recommend this book." —Ken Dychtwald, PhD, founder and CEO, Age Wave, and author of Age Wave, Age Power, The Power Years, and Workforce Crisis "Steve Gresham showed us in The Managed Account Handbook that the basics to a successful advisor do not differ from one country to another. In this book, he is expanding his horizon with his extensive experiences to further help you to develop the skills for building a devoted client base. This is the must-read book for all who want to succeed in the financial advisory industry." —Toshiya Shimizu, President and CEO, Nikko Cordial Advisors Ltd. "For thirty years, advisors have been using wealth accumulation as their main sales weapon. With the boomers entering retirement, all that's out the window. Now the imperatives are income distribution, planning—making sure the investor does not run out of money. In Steve's newest book, he does an excellent job of walking advisors through this change and showing them how to alter their practices to not only survive but thrive. This is a must-read for any advisor who still wants to be in the business in ten years." —Len Reinhart, founder and President, Lockwood Advisors; "For over thirty years, I have sought advice from industry experts who can help me grow and optimize my practice. Steve Gresham's advice is always of interest to me—he is always right there on the cutting edge." —John Rafal, President, Essex Financial Services, Registered Rep.'s Top 50 Financial Advisor for 2006 and Barron's Top 100 Financial Advisor "A good coach can help even the best players reach their potential. As a financial advisor, you coach successful families to tackle life's challenges and achieve their goals. Steve Gresham can help—he has the tactics to help you build a winning team." —Mike Krzyzewski, Head Coach, Duke University Basketball and the 2006 U.S. National Team

About the Author Stephen D. Gresham is Executive Vice President and Director of Retail Markets for Phoenix Investment Partners, Ltd., the \$37 billion asset-management division of The Phoenix Companies. Prior to joining Phoenix, he managed his own wealth-management consulting firm, The Gresham Company, LLC, which served a global clientele of more than fifty financial service companies. He is the author of The Managed Account Handbook and Attract and Retain the Affluent Investor. Gresham serves on the board of governors at The Money Management Institute and is a founding board member of The International Money Management Institute.