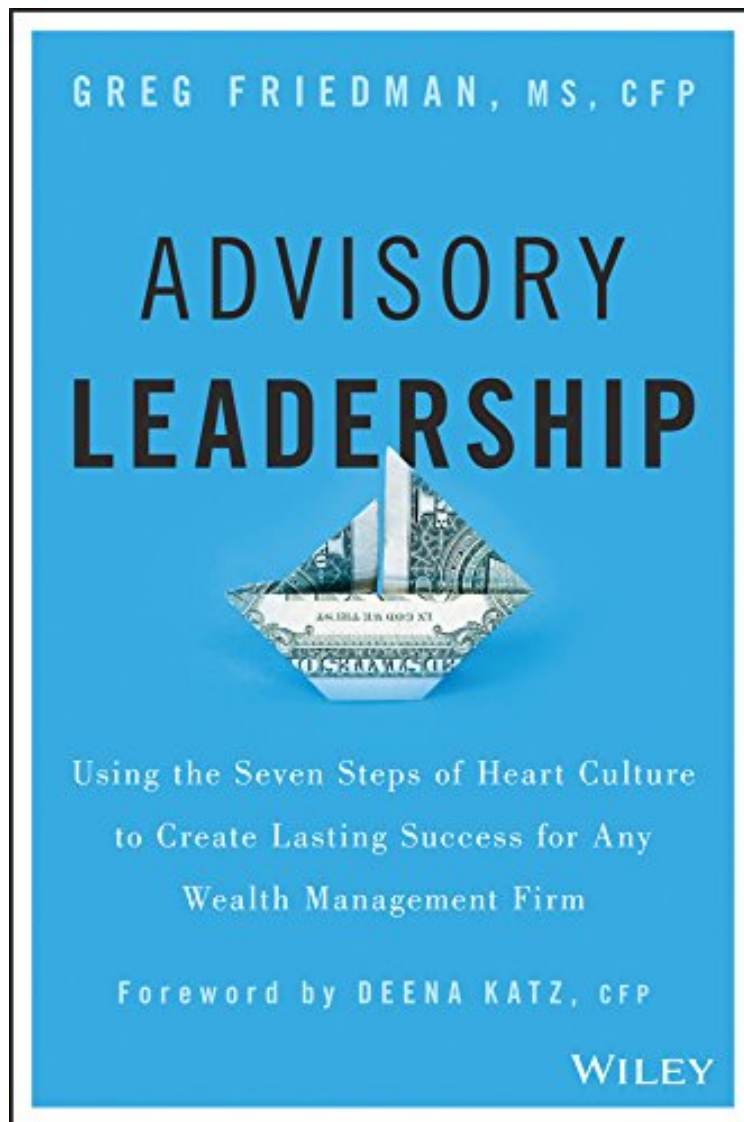


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Advisory Leadership: Using the Seven Steps of Heart Culture to Create Lasting Success for Any Wealth Management Firm

Greg Friedman

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Greg Friedman : Advisory Leadership: Using the Seven Steps of Heart Culture to Create Lasting Success for Any Wealth Management Firm before purchasing it in order to gauge whether or not it would be worth my time, and all praised Advisory Leadership: Using the Seven Steps of Heart Culture to Create Lasting Success for Any Wealth Management Firm:

Thrive in a changing industry by putting your people first Advisory Leadership is a practical and highly executable guide for financial advisors and finance professionals looking to thrive in today's changing financial services industry. Written by a leading financial advisor with practice improvement expertise, this book shows you how to master the art of leadership while remaining agile and adaptable. You'll learn the seven steps you must take to keep pace and thrive amidst the industry's evolution, with clearly articulated explanations and motivational action items. The discussion covers patience, integrity, compassion, respect, consistency, encouragement, and courage; the foundations of success and continued growth; and shows you how to practice what you preach with real strategies for living the vision and being a true leader. The financial services industry is at a crossroads, between a generation on the cusp of retirement and the new generation stepping in to take its place. This transition has been called a crisis of culture, of values, and of communication, but it's really an opportunity. This book faces the changes head-on, and delivers practical solutions that start and end with your greatest resource; your people. Unlock the secrets to a people-first company. Speak openly, walk the walk, and promote personal growth. Reward firm-wide collaboration and a team mentality. Reshape your company's DNA to thrive in today's financial environment. The industry's overarching question is one of differentiation: how can your firm stand out amid the rise of robo-solutions and an unpredictable future? Advisory Leadership shows you how a people-focused company culture can elevate a firm from surviving to thriving.

A third book I enjoyed reading this year, and also asked to blurb, is Greg Friedman's Advisory Leadership. Friedman is somewhat unique; he runs Private Ocean, an advisory firm in San Rafael, CA, and is also the founder of Junxure (and Junxure Cloud), a leading CRM software company that is at the forefront of automated practice management innovations. The book is essentially about creating a people-first culture in your office; the premise of the book is that you, as your firm's leader, have to be somewhat remarkable in order to create a culture where everybody pulls together and is passionate about what they do. You have to exhibit patience, honesty and integrity, compassion, respect, consistency and persistence, encouragement, and courage and each of those qualities gets its own chapter. The idea is that most of us fall short in one or more of these areas, but fortunately for us, they are not innate characteristics that you have to be born with, which means we can improve if we consciously try to become remarkable in seven dimensions. Advisory Leadership offers advice on how to hire into your firm's unique culture (with key interview questions); how to walk the walk of your firm's mission statement (including open and honest communication, but also collegiality with a sense of humor); how to truly care for your staff (Friedman calls them his most valuable clients); and the book also provides some contrasts between a me culture and a heart culture. There's a chapter on promoting personal growth in the staff, and another on how, procedurally, to reward firm-wide collaboration and a team mentality. Bob Veres, Inside Information From the Inside Flap The financial services industry is at a crossroads between a generation on the cusp of retirement and the new generation stepping in to take their place. This transition has been called a crisis of culture, values, and communication, but it's really an opportunity. Advisory Leadership faces the changes head-on and delivers practical solutions that start and end with your greatest resource; the employees driving your firm. Written by an award-winning financial advisor widely considered one of the nation's best in the industry, this inspiring guide is based on his personal seven key steps to transforming a firm's culture to create a dynamic, energetic environment of happily engaged employees. Not coincidentally, the steps to nurturing a heart culture hinge on the human-centric values the next generation of employees hold in high regard, including: Intentionally slowing down the hiring process to better choose the right candidate for any role, every time. Leading by example and encouraging open and honest communication. Acknowledging people for their individual contributions and getting to know them beyond their roles. Empowering employees to make decisions and guiding them in their personal goals for professional achievement. Aligning the management team with the firm's goals and reiterating organizational values through a variety of communication channels. Promoting and rewarding team collaboration over competition. Looking inward before taking the crucial first steps toward change. Greg draws on real-life examples from his two companies to illustrate how he walks the walk, and includes a wealth of convenient rules of thumb to make practicing his strategies simple. Rely on Advisory Leadership to guide you to discover how developing a sense of team can drive a firm forward, weather the growing pains of a changing industry, and generate innovation and profitability. From the Back Cover Praise for Advisory Leadership "Greg has been and continues to be a visionary in the financial advice industry. His forward-looking approach around technology positioned him and his firm as one of the best practices in the business. Now he is focused on communicating why a positive culture will help you achieve both growth and success. This is a must read for anyone currently in a leadership role and those who aspire to be." —Suzanne Siracuse, VP/Publisher, InvestmentNews "Greg Friedman brings a unique perspective to the business of financial advice. Not only is he a successful advisor, but he is a successful business owner who has experienced most every phase in a financial advisory firm's life cycle, from birth to growth to mergers and acquisitions, while at the same time building a leading technology company. He shares his learned wisdom in his current book. You would be wise to add it to your library." —Mark Tibergien, CEO Managing Director, Pershing Advisor Solutions "Technical competence is a given for practitioners but it will not benefit our clients if we don't maintain a viable

business. Greg, a nationally respected practitioner who has 'walked the walk,' shares his extraordinary insights with us in *Advisory Leadership*. Think about it as a 'viable business insurance policy.' Read it, heed it, and you and your clients will be well rewarded." —Harold Evensky, Chairman, Evensky Katz/Foldes Financial "Greg Friedman's *Advisory Leadership* provides meaningful information on practice management and acquisition integration, yet I was most struck by its sense of purpose. Integrating why we do what we do with how we do it was refreshing, rewarding, and exciting." —Ross Levin, CFPreg., Founding Principal and President, Accredited Investor Inc. "Greg Friedman offers what may be the best book in the financial services space on how extraordinary leadership is the key to effective management, with a step-by-step guide on how to function as an extraordinary leader." —Bob Veres, Publisher, Inside Information newsletter "If you're not already an admirer of Greg Friedman, this book should make you one. His prescriptions for a happy, successful advisory firm are based on his own experiences and behavior. You owe it to yourself to pay attention. Forget culture wars. Greg Friedman shows you — not tells you — how to build a culture of peace that will make you and your employees happy and increase your entire team's chances of business success." —James J. Green, Editor, Investment Advisor and ThinkAdvisor