



Financial Accounting for BBA, 2nd Edition

Starting Your Own Practice

Behavioral Finance and Wealth Management

The Definitive Guide to Becoming a Successful Financial Life Planner

The one book your bank Really does not want you to read. More than ever before, Canadians are frightened and stressed out about their retirement and financial future. With the mortgage, car payments and credit card bills, there never seems to be enough to pay the current bills let alone save thousands in RRRSPs. At the same time, the large financial institutions are bombarding us with fearful messages of destitution unless we maximize our RRRSP contributions. The stock market crash of 2008 has proven one thing: traditional retirement planning advice simply doesn't work. The risks are too enormous.

The Supernova Model is a client service, client acquisition, and practice management model that drives an explosive acceleration in revenue and client satisfaction by capitalizing upon the 80/20 Rule. First implemented by financial advisors at Merrill Lynch—under the leadership of author Rob Knapp—it has grown increasingly popular within the financial services industry. The Supernova Advisor skillfully outlines this proven model and reveals how it can be used to create an exceptional experience for your clients, while significantly growing your business.

If you're an advisor, whether you need a push or not, and regardless if you're new or old to the business, this guide will help add instant value to your practice. Using the proven method author David J. Mullen Jr. has taught at Merrill Lynch and is famous for in the industry, The Million-Dollar Financial Services Practice guides aspiring brokers on their journey toward building a lucrative financial services practice. Templates, scripts, letters, and tried-and-true market action plans work together to give you the skills you need to get the appointment, convert prospects to clients, build relationships, retain clients, use niche marketing successfully, and increase the products and services each client uses. In The Million-Dollar Financial Services Practice, you will gain insight into practical areas often overlooked by other industry guides, including: how to work in teams, how to train sales associates, and how to handle and overcome rejection. Updated with new strategies for acquiring affluent clients, the second edition of The Million-Dollar Financial Services Practice includes tips on offering wealth management services, using social media, leveraging alumni marketing, and targeting successful relators as clients to help today's financial service professionals become top producers.

Guarantee your retirement income with a DIY pension Pensionize Your Nest Egg describes how adding the new approach of "product allocation" to the tried-and-true asset allocation approach can help protect you from the risk of outliving your savings, while maximizing your income in retirement. This book demonstrates that it isn't the investor with the most money who necessarily has the best retirement income plan. Instead, it's the investor who owns the right type of investment and insurance products, and uses product allocation to allocate the right amounts, at the right time, to each product category. This revised second edition is expanded to include investors throughout the English-speaking world and updated to reflect current economic realities. Readers will learn how to distinguish between the various types of retirement income products available today, including life annuities and variable annuities with living income benefits, and how to evaluate the features that are most important to meet their personal retirement goals. Evaluate the impacts of longevity, inflation, and sequence of returns risk on your retirement income portfolio Make sense of the bewildering array of today's retirement income products Measure and maximize your Retirement Sustainability Quotient Learn

how your product allocation choices can help maximize current income or financial legacy – and how to select the approach that's right for you Walk through detailed case studies to explore how to pensionize your nest egg using the new product allocation approach Whether you do it yourself or work with a financial advisor, Pensionize Your Nest Egg gives you a step-by-step plan to create a guaranteed retirement income for life. The Supernova Advisor

Success as a Financial Advisor For Dummies

A Proven System for Becoming a Top Producer

How to Use Product Allocation to Create a Guaranteed Income for Life

Managing Concentrated Stock Wealth

How to Retire Well Without the Stock Market, Mutual Funds, Or Even an Investment Advisor

A comprehensive guide to living trusts, with expert financial and legal guidance The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing, living with, and maintaining a living trust. Written by renowned family inheritance attorney Jeffrey L. Condon, this book discusses the various aspects of this important document, and shows you how to manage a seamless transfer of assets to various beneficiaries. This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication, giving you the most up-to-date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability. You'll develop a vision for your trust before you ever meet with an attorney or other key players, and learn how to establish and maintain a trust that remains rock-solid for your lifetime and beyond. As the living trust has replaced the will as the primary means of settling after-death estates, clear guidance and current legal information is of utmost importance for advisors and clients alike. This book is a valuable resource for every stage of planning and execution, helping you ensure that you provide for your beneficiaries the way you intend. Know what to think about before your first meeting with a lawyer Establish and manage your living trust to carry out your wishes Identify potential inheritance problems and build solutions into the trust Distribute assets to future generations, and protect them after the transfer Dealing with complex financial and legal issues while facing our own mortality is a difficult task, but making these decisions is critical to the future outcome of your estate. The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out.

Tired of spending more time with filing cabinets than with clients? Is overhead eating up margins? Now, two leading financial planners and columnists deliver the help advisers have been begging for. Virtual-Office Tools for a High-Margin Practice is a nontechnical trove of technology, clever workarounds, and procedural efficiencies tailored to help financial advisers move toward a paperless office, while still complying with SEC record-keeping requirements. The authors show planners how to reduce the amount of paperwork in their offices by 99 percent, slash overhead, and find anything they need in one minute or less by adapting innovative software tools and shifting from on-site employees to remote assistants and virtual work partners. Until now, creative ways of working this smart were hard to come by. With this book, they are available, ready to go, and easy to implement.

Provides expert insight and advice for professionals looking to strike out on their own, fully updated to reflect current trends and issues Considering the overabundance of professional service providers toiling at monolith employers, you might want to start thinking about business independence. Starting Your Own Practice: The Independence Guide for Investment Advisors, Attorneys, CPAs and Other Professional Service Providers offers you step-by-step guidance on the entirety of the independence process, from your initial decision to break free, to managing your business, to your ultimate exit strategy. In the 15 years since he first wrote Starting Your Own Practice, author Robert Fragasso has gained invaluable practical experience continuing to lead his own independent investment management and financial planning firm. Now in its Second Edition, this popular guide provides more depth on management considerations, transition to business maturity, and eventual profitable business succession. The author has added a wealth of alternative ideas on how to leverage your skills and talents in your own business, license your services and infrastructure, plan for your retirement, and more. Sharing new insights on making the independence move quicker, easier, and less costly, this new edition Provides straightforward information on both the financial benefits and risks of starting your own practice Helps you decide if you truly want to go into business for yourself Offers expert guidance on planning your move and structuring your marketing, managing, staffing, and general business operations Discusses practical considerations such as leaving your current employer, converting existing clients, protecting your confidentiality, and financing your new business Provides new and revised content throughout, including additional in-depth commentary on management considerations and transition to business maturity Starting Your Own Practice: The Independence Guide for Investment Advisors, Attorneys, CPAs and Other Professional Service Providers is indispensable for anyone providing skilled personal services.