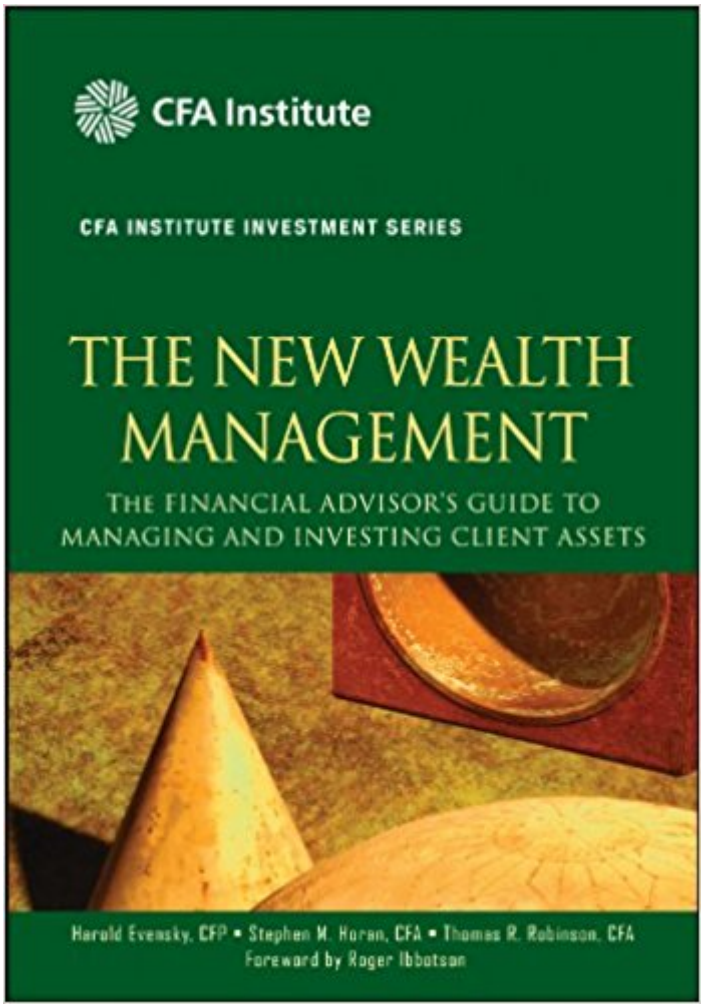
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The New Wealth Management: The Financial Advisor's Guide To Managing And Investing Client Assets (CFA Institute Investment Series)




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Synopsis

Mainstay reference guide for wealth management, newly updated for today’s investment landscape For over a decade, The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets has provided financial planners with detailed, step-by-step guidance on developing an optimal asset allocation policy for their clients. And, it did so without resorting to simplistic model portfolios, such as lifecycle models or black box solutions. Today, while The New Wealth Management still provides a thorough background on investment theories, and includes many ready to use client presentations and questionnaires, the guide is newly updated to meet twenty-first century investment challenges. The book Includes expert updates from Chartered Financial Analyst (CFA) Institute, in addition to the core text of 1997’s first edition ? endorsed by investment luminaries Charles Schwab and John Bogle Presents an approach that places achieving client objectives ahead of investment vehicles Applicable for self-study or classroom use Now, as in 1997, The New Wealth Management effectively blends investment theory and real world applications. And in today’s new investment landscaped, this update to the classic reference is more important than ever.

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Customer Reviews

I am using this book for a portfolio management course. It is very well written.

I've been in the financial services industry for over 20 years and this is one of the well written and researched books I've read on on wealth management. It's very academic and it's proof points are very powerful. I enjoyed the research based facts and I liked the format of the book. It is written by many people with different styles but the book was very fluid. If you are in the wealth planning industry this book will be very informative and educational. Your clients will appreciate the increased wisdom in your interactions.

As a 30-year CFP veteran and a part-time university instructor, I have searched in vain for many years to find a good text. Look no further, this is finally it! The textbook is appropriate for new financial planners as well as for veterans and university instructors.

Excellent information, a required textbook for Evensky's Wealth Management grad course. I'll keep this book for future reference.

Great BOok. purchased for a class. I will keep it for my personal Collection.

Great book!!

Required fir class yet text you will want to own for career

Great practitioners guide. Perfect for what I was looking for. A good mix of theory and practice with an emphasis on practice.

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