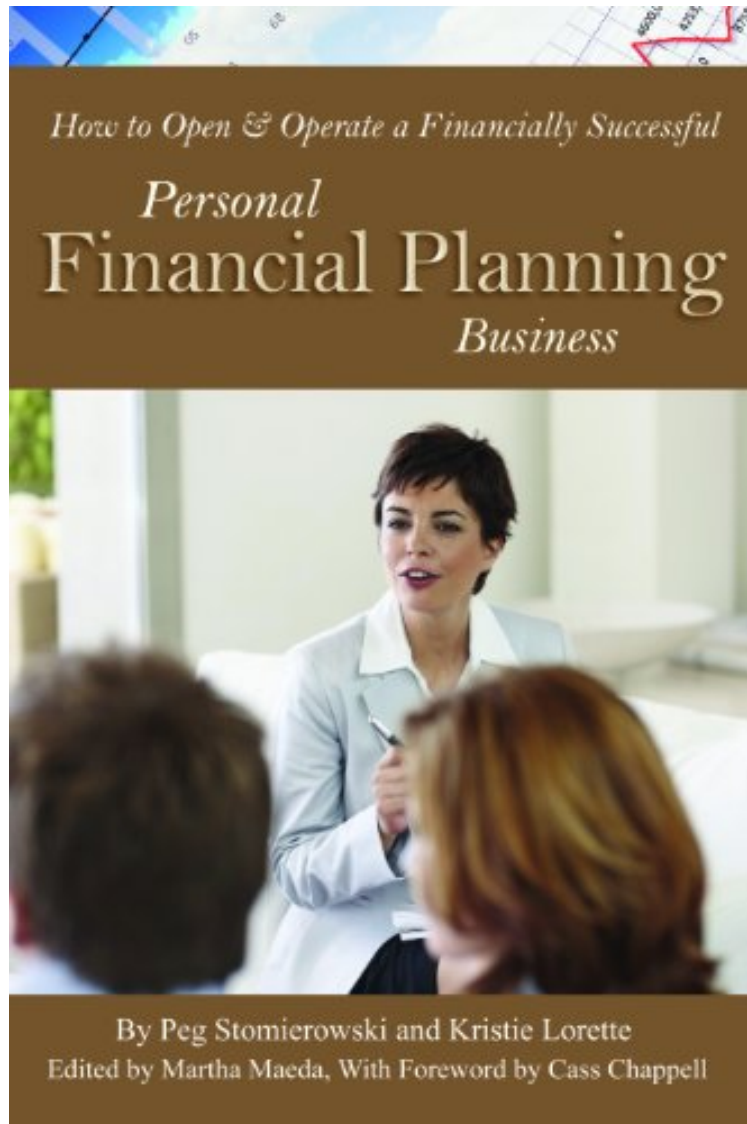


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How to Open Operate a Financially Successful Personal Financial Planning Business (How to Open and Operate a Financially Successful...)

Martha Maeda

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Millions of Americans every year have troubles with their finances. They turn to experts in droves, asking for help in filing their taxes, consolidating their debt, or just planning how they will pay their bills and invest their retirement funds. This book was written for anyone who has ever wanted to dip his or her foot into financial planning but did not know where to start. You will learn the fundamental basics of financial planning, starting with the very process that most planners use to organize their own finances. You will learn how to organize financial statements and to create plans and how to properly manage taxes to great effect. You will learn how to manage basic assets such as cash, savings, home equity, and auto- mobiles. You will learn how to effectively manage credit and how to deal with insurance including life insurance, health insurance, and property insurance.Whether you will be operating out of your home or you are looking to buy or rent office space, this book can help you with a wealth of startup information, from how to form and name your business to deciding if this will be a joint venture or if you would rather work solo. You will learn how to build your business by using low- and no-cost ways to satisfy customers, and also ways to increase sales, have customers refer others to you, and thousands of excellent tips and useful guidelines.This complete manual will arm you with everything you need, including sample business forms; contracts; worksheets and checklists for planning, opening, and running day-to-day operations; lists; plans and layouts; and dozens of other valuable, timesaving tools of the trade that no business owner should be without. For all prospective financial planners, this guide will give you a complete walkthrough and timeline of what you need to accomplish to be effective.The companion CD-ROM is not available for download with this electronic version of the book but it may be obtained separately by contacting Atlantic Publishing Group at sales@atlantic-pub.com.Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president's garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed. This Atlantic Publishing eBook was professionally written, edited, fact checked, proofed and designed. The print version of this book is 288 pages and you receive exactly the same content. Over the years our books have won dozens of book awards for content, cover design and interior design including the prestigious Benjamin Franklin award for excellence in publishing. We are proud of the high quality of our books and hope you will enjoy this eBook version.

Stomierowski (writer, editor and columnist) and Lorette (copywriter and marketing consultant) offer a guide to operating a personal financial planning business covering both practical concerns such as financing and insuring one's business, and more personal matters such as evaluating one's strengths to find the best niche. A personality quiz is

included, to evaluate aspects like whether one is better off starting a new business, entering into a partnership, or going into franchise ownership. The companion CD-ROM contains all the forms found in the book as well as an editable sample business plan. --Annotation copy;2012 Book News Inc. Portland, OR