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

Stephen D. Gresham
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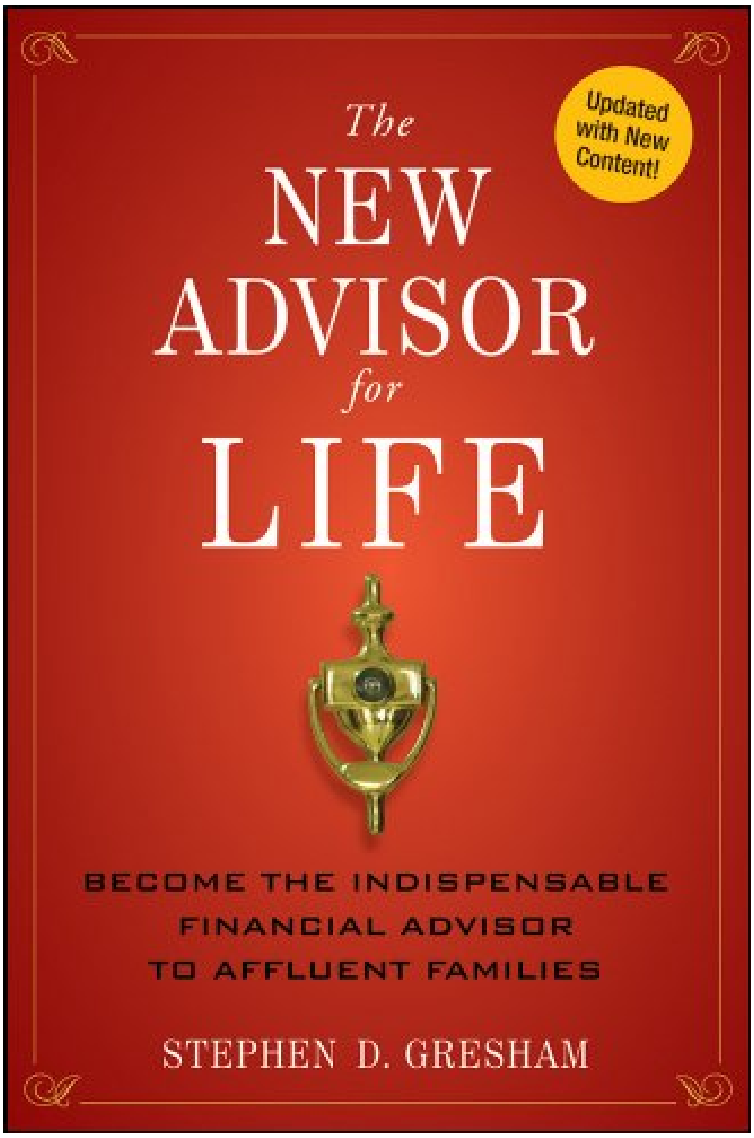

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Stephen D. Gresham : The New Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families before purchasing it in order to gage whether or not it would be worth my time, and all praised The New Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families:

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Expert advice on building an unshakable foundation as a financial advisor to the elite The revised and updated edition of the definitive guide to growing and maintaining a financial advice firm, The New Advisor for Life explores the fallout of the market crash on up-and-coming advisors. With a particular focus on the generation X and Y concern with debt management and long-term investment, this new edition examines what young investors look for in an advisor. Today, more than ever, insight, analysis, and validation are valued, but to be truly successful, an advisor needs to walk the line between being well-informed but not appearing condescending. What today's investors want in a financial advisor is someone who can cut through the noise and clutter of the financial services industry and the mainstream media Covers the basics, from setting a client's investment goals, selecting complementary investments, and monitoring portfolio balance, to the advancedmdash;developing a personal finance plan for your clients based on their specific needs Steve Gresham presents a 19-point checklist for financial advisors to offer their clients "life advice" Keeping clients engaged is more important than ever, and The New Advisor for Life gives the aspiring financial advisor the secrets to success normally reserved for the country's top firms.

From the Inside FlapThe revised and updated edition of the definitive guide to growing and maintaining a financial advice firm, The New Advisor for Life: Become the Indispensable Financial Advisor to Affluent Families, explores the fallout of the market crash on up-and-coming advisors. With a particular focus on the Generation X and Y concern with debt management and long-term investment, this new edition examines what young investors look for in a financial advisor. More than ever before, what today's investors want is someone who can cut through the noise and clutter of the financial services industry and the mainstream media and provide real insight and analysis. To be truly successful, an advisor needs to walk the line between being well informed and not appearing condescending. As the financial services sector becomes increasingly competitive, advisors set on achieving lasting and meaningful success need to be able to present advice that makes them stand apart from the competition. In The New Advisor for Life, financial expert Stephen Gresham presents a lifetime of insider secrets on how to give investors what they want: information that until now has been reserved for closed-door meetings with the country's top firms. Coupled with a checklist exclusive to this book, which advisors can use to offer their clients advice on how to best live successful and fulfilling lives, and corresponding chapters that explain, step-by-step, how to make the most of these factors, this book is a must-have for anyfinancial advisor.From the Back Cover"The Age Wave of retiring baby boomers is creating a seismic bonanza for financial advisorsmdash;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." mdash;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."mdash;Toshiya Shimizu, Deputy President, Nikko Global Wrap "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 and planningmdash;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." mdash;Len Reinhart, President, Reinhart Consulting Group "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 helpmdash;he has the tactics to help you build a winning team." mdash;Mike Krzyzewski, Head Coach, Duke University Basketball and USA Basketball, 2010 Men's National Team Praise for The NEW ADVISOR for LIFE "There is a certain rarefied space that exists between clients and their advisors that very few people (or industry professionals) understand. Not only does Steve Gresham intuitively grasp the heart of this relationship, but he singularly articulates what it entails." mdash;Evan Simonoff, Editor in Chief, Financial Advisor "Steve Gresham has done it again. Nobody in the financial service industry understands the needs of high net worth clients and the strategic implications and opportunities for advisors as well. The New Advisor for Life will be your go-to bible. Bring your highlighter!"mdash;Leo Pusateri, President and founder of Pusateri Consulting and author of mirror mirror on the wall am I the most valued of them all? and You Are the Value Updated with New Content!About the AuthorSteve Gresham has over thirty years' experience in the financial and investment world. He is a Visiting Instructor at the A. Alfred Taubman Center for Public Policy and American Institutions at Brown University, and is business chair of Brown's Retirement Readiness Project. Gresham has published more than a hundred articles and has been featured in BusinessWeek, Fortune, Investment News, and the New York Times, and is the author of four books, including Advisor for Life and The New Managed Account Solutions Handbook, both from Wiley. He was named Mutual Fund Marketer of the Year in March 2007 by Institutional Investor/Fund Action.