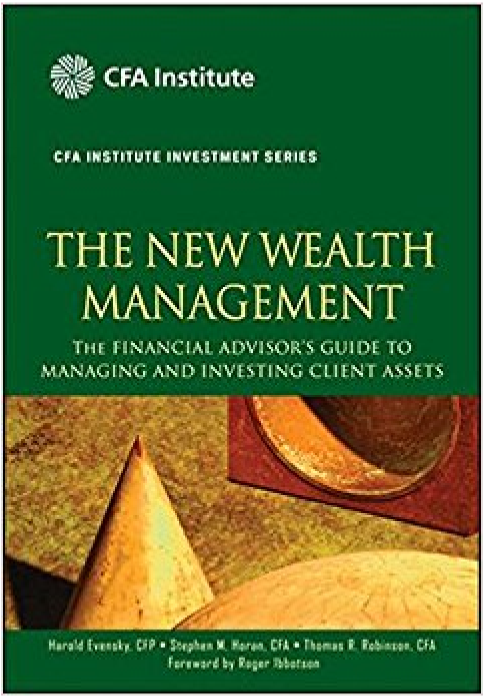
The New Wealth Management: The Financial Advisor's Guide To Managing And Investing Client Assets



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 Ã Â¿Â 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

Resources for professionals interested in portfolio and asset management abound, but not much is available for those managing private wealth or handling the portfolios of multiple clients. Now in its second edition, The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets continues to remedy this by providing a comprehensive reference for financial planners with detailed and accessible guidance on developing optimal asset allocation policies for clients. As part of the CFA Institute Investment Series, the book is designed for a wide array of readers, ranging from graduate-level students focused on finance to practicing investment professionals, and everyone in between. More relevant than ever before, this newly revised edition by Harold Evensky, along with Stephen Horan and Thomas Robinson, provides you with the most up-to-date information associated with this important discipline. Requiring customized solutions that address clients' individual needs, the wealth management approach is unique in the world of finance. Bringing together in-depth writings on the most important wealth management issues with expert opinions and recommendations, The New Wealth Management contains clear, example-driven coverage about how to place client objectives ahead of investment vehicles. With the authors bringing their own unique experiences and perspectives to the study of wealth management, this book distills the knowledge, skills, and abilities you need to succeed in today's dynamic financial environment. Filled with in-depth insights and practical advice, The New Wealth Management is required reading for anyone interested in managing private wealth.

PRAISE FOR The new wealth management "The business of wealth management is about more than exercising fiduciary responsibility over client funds. The New Wealth Management explains the importance of working to achieve client objectives beyond simply managing their money. This book is an advisor's road map to building and maintaining client wealth and well-being." â ”Meir Statman, Glenn Klimek Professor of Finance, Santa Clara University, author of What Investors Really Want "The wealth management industry is a work-in-progress. It is thus fitting that, once in a while, insightful authors take the time to collate the state of the current wisdom and create a book such as The New Wealth Management. It should be required reading for anyone practicing the trade, and many clients might also benefit. It is comprehensive, clear, and well written. It is hard to think of one good reason not to have this book by one's side, as the handbook to which one turns when faced with a challenge." â ”Jean Brunel, Managing Principal, Brunel Associates "The New Wealth Management is a masterpiece. Even the most experienced financial advisor has much to gain from this comprehensive, practitioner-focused manual. The well-crafted essays covering the most important issues for today's wealth managers integrate the essential parts of the wealth management process. I highly recommend this outstanding book." â ”Michael Pompian, CFA, CFP, Director, Private Wealth Practice, Hammond Associates, author, Behavioral Finance and Wealth Management "Since Wealth Management was first published in 1997, it has been the authoritative guide for the wealth management profession. The New Wealth Management is a more than worthy successorâ ”comprehensive, accessible, and written specifically for practitioners. No one who takes their practice and their profession seriously should be without it. It is the definitive ’how to’ reference book for wealth managers." â ”Scott Welch, CIMA, Senior Managing Director, Investment Research & Strategy, Fortigent, LLC "Advisors working with investors of all types must not only have expertise, they must view the services they deliver through the eyes of the client. They must open broader conversations with investors about risk, investment acumen, and psychological biases. Through practical and situational application, this book guides advisors significantly in that direction. It is an excellent portfolio management resource which belongs in every advisor’s library." â ”Lisa Gray, Managing Member, Graymatter Strategies, LLC, author of The New Family Office and Generational Wealth Management

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.

The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets (CFA Institute Investment Series) Real Estate: 25 Best Strategies for Real Estate Investing, Home Buying and Flipping Houses (Real Estate, Real Estate Investing, home buying, flipping houses, ... income, investing, entrepreneurship) Family Wealth--Keeping It in the Family: How Family Members and Their Advisers Preserve Human, Intellectual, and Financial Assets for Generations Family Wealth: Keeping It in the Family--How Family Members and Their Advisers Preserve Human, Intellectual, and Financial Assets for Generations (Bloomberg) The Book on Rental Property Investing: How to Create Wealth and Passive Income Through Smart Buy & Hold Real Estate Investing The Book on Rental Property Investing: How to Create Wealth and Passive Income Through Intelligent Buy & Hold Real Estate Investing! How to Have Outrageous Financial Abundance In No Time::Biblical Principles For Immediate And Overwhelming Financial Success: Wealth Creation,Personal Finance, Budgeting, Make Money,Financial Freedom Client Tracking: Large 8.5 Inches By 11 Client Profile Log Book Including Address Details And Appointment Salon Client Book: Large 8.5 Inches By 11 Client Profile Log Book Including Address Details And Appointment The Handbook of Alternative Assets: Making money from art, rare books, coins and banknotes, forestry, gold and precious metals, stamps, wine and other alternative assets Beauty Salon Client Record Card Template: Hair Stylist Client Log Estate Planning for the Savvy Client: What You Need to Know Before You Meet With Your Lawyer (Savvy Client Series) (Volume 1) Estate Planning for the Savvy Client: What You Need to Know Before You Meet With Your Lawyer (Savvy Client Series Book 1) Client Teaching Guides For Home Health Care (Gorman, Client Teaching Guides for Home Health Guides) The Public Wealth of Nations: How Management of Public Assets Can Boost or Bust Economic Growth Asset Management: A Systematic Approach to Factor Investing (Financial Management Association Survey and Synthesis) The Only Guide You’ll Ever Need for the Right Financial Plan: Managing Your Wealth, Risk, and Investments The Public Wealth of Cities: How to Unlock Hidden Assets to Boost Growth and Prosperity Succeed with Senior Clients: A Financial Advisor’s Guide to Best Practices