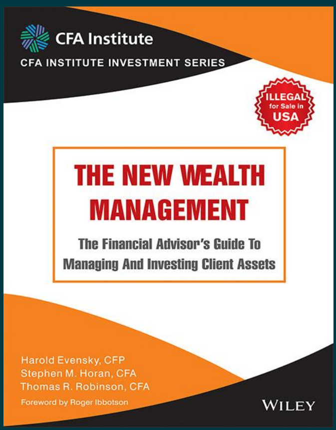

The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets(CFA Inst. Investment Series)

By Harold Evensky, Stephen M. Horan, Thomas R. Robinson, Roger Ibbotson

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Description

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.

About the Author

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