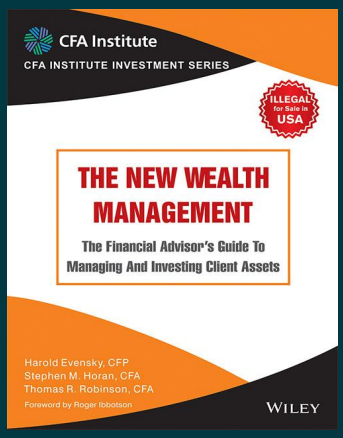
WILEY



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

Paperback 9788126564750 **₹1,549.00**

Pages: 480

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

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

Harold Evensky is president of Evensky & Katz

Table of Contents

Acknowledgments

Foreword

Preface

Chapter 1 The Wealth Management Process

Chapter 2 Fiduciary and Professional Standards

Chapter 3 Client Goals and Constraints

Chapter 4 Risk Is a Four-Letter Word

Chapter 5 Data Gathering and Analysis

Chapter 6 Client Education

Chapter 7 Mathematics of Investing

Chapter 8 Investment Theory

Chapter 9 Asset Allocation

Chapter 10 Portfolio Optimization

Chapter 11 Taxes

Chapter 12 Retirement Planning

Chapter 13 Investment Policy Statement

Chapter 14 Portfolio Management

Chapter 15 Performance Appraisal and Evaluation

Chapter 16 Selecting Investment Managers

Chapter 17 Philosophy, Process and People

About the Authors

About the CFA Institute Investment Series

About the CFA Program

Index

To purchase this product, please visit:
https://www.wileyindia.com/the-new-wealth-management-the-financial-advisor-s-guide-to-managing-and-investing-client-assets.html

Scan to buy