

Why is account management important?



Improves
customer satisfaction:



Increases
revenue



Enhances
efficiency



Makes performance
measurement easier



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J.K. Lasser Pro Separate Account Management Larry Chambers, Ken Ziesenheim, Peter Trevisani, 2003-06-03 A FINANCIAL ADVISOR S GUIDE TO A PERSONAL AND FLEXIBLE MONEY MANAGEMENT APPROACH FOR HIGH NET WORTH CLIENTS Twenty years ago separate account management programs SAMs were reserved for the sophisticated advisor who only served the very wealthy Today SAM programs have become available to most advisors and several layers of the affluent If you intend to work with affluent clients that demand personal and flexible service you must have a complete understanding of this approach to money management and J K Lasser Pro Separate Account Management is the perfect guide Filled with in depth insights and expert advice J K Lasser Pro Separate Account Management will introduce you to the nuances of separate account management as well as show you how to use this investment vehicle to build your business and help your clients reach their financial goals This invaluable resource will Take the mystery out of providing professional asset management services to a broad cross section of your clients Educate you about the opportunities and advantages of using separately managed accounts Provide you with information about how separately managed accounts work as well as who should be in them Illustrate how you can employ separately managed accounts in your financial advisory practice Learn how to convert from commission to fees And much more Filled with practical guidance and vital information J K Lasser Pro Separate Account Management is a valuable road map for financial professionals looking to master this unique approach to managing money

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