

Rattiner's Financial Planner's Bible



The Advisor's Advisor

Jeffrey H. Rattiner

WILEY

Rattiners Financial Planning Bible The Advisors Advisor

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Rattiner's Financial Planner's Bible Jeffrey H. Rattiner, 2002-10-10 Jeff Rattiner has found another way to help producers This book is a must have for financial advisors especially those that aspire to be Million Dollar Producers Thomas B Gau CPA CFP President and CEO of Million Dollar Producer Jeff Rattiner has done it again His book displays all the essential tools and techniques necessary for advanced planners to succeed in this business Rattiner s easy to read style provides the best in marketing and practice management ideas This book will help you if you have hit a dead end in your practice Rattiner tells it like it is by providing a no nonsense approach to truly taking your practice to the next level A must read for the serious financial advisor Jim Cannon President SunAmerica Securities Sentra Securities Corporation and Spelman Co Inc Financial planners provide a variety of services to an array of clients but lack a uniform system for creating a profitable business Rattiner s Financial Planner s Bible The Advisor s Advisor collects best practices from the nation s leading financial planners presenting a prototype turnkey model for achieving financial success for both the client and the practice Financial planning expert Jeffrey Rattiner emphasizes an ethical practical approach to financial advising placing paramount importance on doing what s best for the client Drawing on extensive interviews and his own experience Rattiner delivers can t miss tips on marketing a financial planning practice developing an infrastructure crafting strategic alliances assessing a business s profitability and creating the model twenty first century practice This authoritative guide also covers Forming a planning advisory board Establishing a realistic chain of command Delegating responsibility Making technology work for you Charging clients appropriately Running a financial planning business need not be an exercise in trial and error Rattiner s Financial Planner s Bible delivers a compelling model for advising success Getting Started as a Financial Planner Jeffrey H. Rattiner, 2010-05-21 There has never been more opportunity for financial planners or more reasons for financial professionals to consider switching the direction of their careers into this lucrative field Today s planners will cash in on the huge surge of baby boomers preparing for retirement in the decades ahead And as the number and complexity of investments rises more individuals will look to financial advisers to help manage their money In the new paperback edition of this guide Jeffrey H Rattiner a practicing financial planner and educator provides a complete systematic turnkey framework for the aspiring planner to follow Starting from the key question Why do you want to be a financial planner the author guides you through the development of an effective infrastructure and client management system for your practice The many essential concepts are clearly illustrated with examples from practicing professionals Throughout this handbook Rattiner provides personal insights on how and why a planner must develop a solid understanding of client needs before building a comprehensive financial plan Getting Started as a Financial Planner has everything one needs to know from how to set up a practice and communicate with clients to how to manage investments and market services in order to launch a career in financial planning and to attain success in this high growth profession **Rattiner's Secrets of Financial Planning** Jeffrey H. Rattiner, 2020-10-06 Learn

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Success as a Financial Advisor For Dummies Ivan M. Illan, 2018-11-13 A must have reference for financial advisors In step by step detail Success as a Financial Advisor For Dummies covers how a current or would be financial advisor can maximize their professional success through a series of behaviors activities and specific client centric value propositions In a time when federal regulators are changing the landscape on the standard of care that financial services clients should expect from their advisors this book affords professionals insight on how they can be evolving their practices to align with the regulatory and technological trends currently underway Inside you ll find out how a financial advisor can be a true fiduciary how to compete against the growing field of robo advisors and how the passive investing trend is actually all about being an active investor Additionally you ll discover time tested advice on building and focusing on client relationships having a top advisor mindset and much more Master the seven core competencies Attract and win new business Pick the right clients Benchmark your performance Start your own firm Brimming with practical expert advice Success as a Financial Advisor For Dummies is a priceless success tool for any wannabe or experienced financial advisor

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Life Centered Financial Planning Mitch Anthony, Paul Armson, 2020-11-03 Bring your financial planning to life by bringing life to your financial planning Life Centered Financial Planning How to Deliver Value That Will Never Be Undervalued shows financial planners and advisors how to radically improve the service they provide to their clients by tying their decisions and strategies to their clients life events stages and goals Written by distinguished financial professionals Mitch Anthony and Paul Armson Life Centered Financial Planning provides readers with practical advice and concrete strategies to revolutionize their organization and client service by Focusing on what matters most to clients rather than maximizing assets under management or pushing products Understanding that a strong financial plan means more than simply accumulating as much money as possible Building a business model that is good for everyone involved the financial advisor clients and the organization Moving from being a commodity to being your client s trusted advisor The book is perfect for any financial planner or advisor who wishes to adapt to the radical redefinition of financial services taking place today

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connection between financial planning and life planning Its premise is that advisors of the future will need to deal more with money as an element of a client s life that cannot be viewed alone *The Financial Advisor's Success Manual* David Leo,Craig Cmiel,2017-12-07 Do you want to become a million dollar financial advisor boost client satisfaction and dramatically expand your business This book provides all the answers and strategies you need to do just that Complete with proven techniques expert insights and practical tips to maximize your profitability *The Financial Advisor s Success Manual* will show you how to break the cycle of moderate growth by teaching you how to Develop a differentiation strategy Define and implement your six core client facing processes Balance the cost of services with the value delivered Enhance client loyalty Perfect your personal marketing and sales approach You didn t start your financial services firm with a goal of modest gains So don t settle for that By implementing the methodologies and strategies in this manual you can grow your business beyond your wildest expectations all while serving your clients better **So You Want To Be A Financial Planner** Nancy Langdon Jones,2002-12-01 **The Smart Financial Advisor** Bill Martin CFA,2017-10-25 **The Holy Spirit, Your Financial Advisor** Dr. Creflo Dollar,2013-09-17 Most people are cautious about any advice they receive concerning their finances But what if that advice were to come from the Holy Spirit the third person of the Trinity In *The Holy Spirit Your Financial Advisor* Dr Creflo Dollar investigates what the Bible has to say about the role of the Holy Spirit in the area of making and keeping money and discovers some surprising truths In this book readers will discover that the Holy Spirit will help them Know what God s word says about the person and work of the Holy Spirit Hear and obey the guidance provided by the Holy Spirit Access supernatural power to manage money Apply practical knowledge to take control of finances Tap into the wisdom of total life prosperity Change a poverty mindset Discover God s system of seedtime and harvest Practice true success Practical application questions and activities at the end of each chapter provide the reader with further helpful strategies for obtaining financial freedom [The Ultimate Financial Plan](#) Jim Stovall,Tim Maurer,2011-09-06 How to build a financial plan that really blends into your life The latest volume in the bestselling Ultimate series Jim Stovall and Tim Maurer s *The Ultimate Financial Plan Balancing Your Money and Life* is a one stop comprehensive personal financial planning book exploring the intersection of money and life *The Ultimate Financial Plan* examines the connection between actions thoughts and feelings when it comes to all things financial The key to getting the most out of your wealth the authors argue is certainly found in the wise utilization of tools like budgets bank accounts 401 k s IRAs Roth IRAs education savings plans and real estate as well as home auto business health disability and long term care insurance but even more so in the contentment found in balancing money s influence in our lives with personal values and goals An insider s look into the recently humbled Big 3 the banks brokerage firms and insurance companies and the inner workings that often set their proprietary goals and objectives above all A critical examination of the role of various financial sales people advisors planners and consultants A guide to navigating Economic Bias a conflict of interest involving money and how it affects every financial decision we make

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Handbook of Financial Planning Jae K. Shim, 2004 A must read for financial professionals and serious investors alike this one stop resource offers valuable insight into complex and fast changing financial markets and advisory markets It provides in depth coverage of all the topics key to personal finance including record keeping present and future value in investing financial career planning educational planning cash management consumer credit housing insurance investment choices retirement planning estate planning tax issues and much more Packed with helpful tips and lessons this comprehensive handbook will help professional investors in advising customers as well as provide relevant cutting edge information for independent investors

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