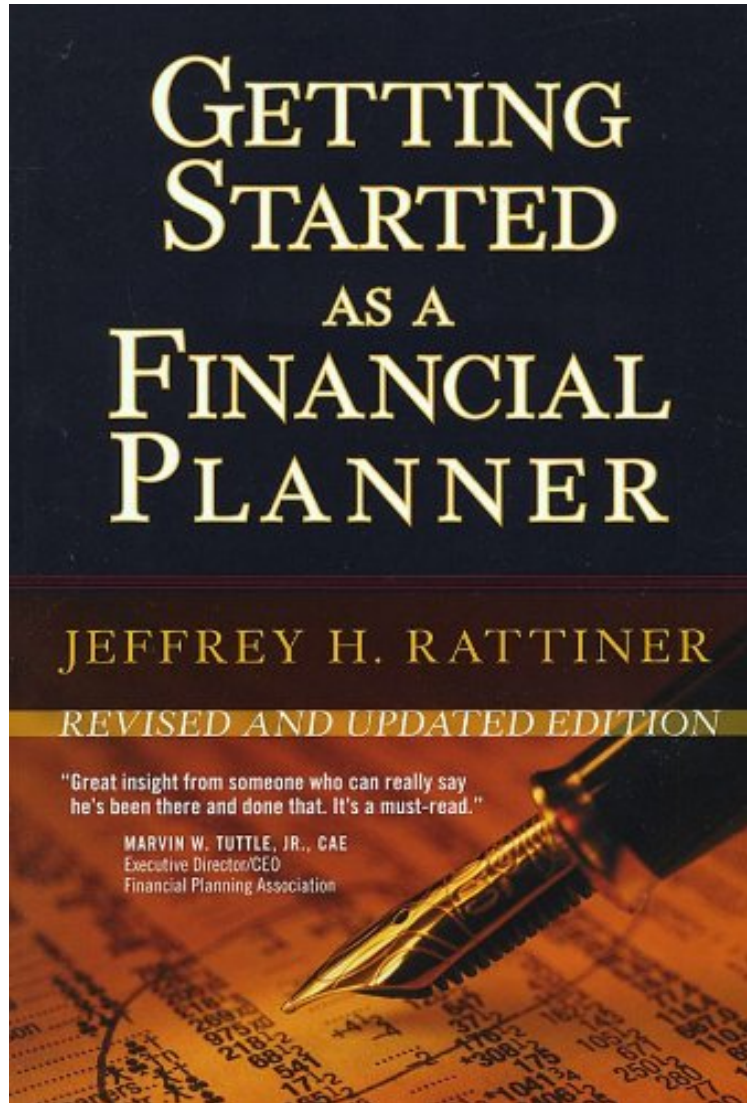


(Read now) Getting Started as a Financial Planner (Bloomberg)

Getting Started as a Financial Planner (Bloomberg)

Jeffrey H. Rattiner

*ebooks | Download PDF | *ePub | DOC | audiobook*



DOWNLOAD



READ ONLINE

#951537 in eBooks 2010-05-21 2010-05-21 File Name: B003NX731A | File size: 49.Mb

Jeffrey H. Rattiner : Getting Started as a Financial Planner (Bloomberg) before purchasing it in order to gage whether or not it would be worth my time, and all praised Getting Started as a Financial Planner (Bloomberg):

0 of 0 people found the following review helpful. DisappointedBy S. TrojanJust bought the book. I am a CPA and still new to financial planning, but I have been licensed for a while. I still consider myself as a beginner, so I thought this book would be useful. I was very disappointed at the lack of details in the book. I was hoping for more real-life examples, more checklists and templates. If you never have put your toes in the industry, the book might be useful. Might. Otherwise I was very disappointed.0 of 0 people found the following review helpful. but SO boring it's on my bookcase of "something to get to"By ipka54Gives you the information you need, but SO boring it's on my bookcase of

"something to get to" eventually 0 of 0 people found the following review helpful. Four Stars By Customer It provides excellent, succinct information for starting out as a financial planner.

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 you need 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 attain success in this high-growth profession.

"When asked to recommend books for new advisers, we often suggest Getting Started as a Financial Planner." - Investment Advisor
"A must-read for emerging financial planners." - Advisor Today
"For anyone entering the profession or transitioning to financial planning from a related field, Getting Started as a Financial Planner is well worth reading. Experienced planners who never seem to find the time to do practice planning should also benefit." - Horseshmouth.com
"Jeff Rattiner has been intimately involved with the development of the financial planning profession for nearly twenty years as a planner, teacher, author, and educational innovator. For anyone who is serious about entering financial planning as a first or new career, Getting Started as a Financial Planner provides great insight from someone who can really say he's been there and done that. It's a must-read." - Marvin W. Tuttle, Jr., CAE Executive Director/CEO Financial Planning Association
"Getting Started as a Financial Planner is a must-read for any professional interested in a career in financial planning. As one of the industry's most respected teachers and practitioners, Jeff's book is packed with useful insights that every newcomer needs to be successful." - John Whelan Publisher, Financial Planning
"Right now, many people want to get into the field of financial planning but may not know how. Jeff's easy-to-read, comprehensive primer is an excellent tool for those looking to get started in the profession, and highlights the client-centered approach that is crucial to the success of any financial planning practice." - Robert P. Goss, JD, PhD, CFP Former President and CEO, Certified Financial Planner Board of Standards
"Thinking of becoming a financial planner or adding the planning discipline to your current professional practice? Jeff Rattiner has written the perfect cookbook for those who want to enter the financial planning profession. His book is chock full of winning recipes that will undoubtedly help newcomers create truly successful financial planning practices. You could probably make the leap without his book, but why would you want to?" - Deena Katz, CFP President, Evensky Katz Author of Deena Katz on Practice Management and Deena Katz's Tools and Templates for Your Practice
"I wish this book was available when I started in financial planning. The book manages to integrate how to be a financial planner with the academics of financial planning. The step-by-step programmed approach can serve as a daily guide. Rattiner's extensive experience as a teacher, resource person, and planner gives a perspective lacking in today's curriculum." - Steven I. Levey, CPA/PFS Managing Director, GHP Horwath, P.C.
"If you truly want to serve your clients successfully, then you owe it to yourself and your clients to read this book. It's a step-by-step guide that will help your clients achieve their financial dreams." - John Bowen President and CEO, CEG Worldwide
About the Author Jeffrey H. Rattiner, CPA, CFP, MBA, is president and CEO of JR Financial Group, Inc., a financial planning, money management, and tax information firm. Formerly the director of professional development and corporate sponsorship for the Institute of Certified Financial Planners, he also served as director of technical standards and as a technical manager of the Personal Financial Planning Division of the AICPA. He is the author of several books and a monthly columnist for Financial Planning magazine.