(Mobile book) Implementing the Wealth Management Index: Tools to Build Your Practice and Measure Client Success (Bloomberg Financial)

Implementing the Wealth Management Index: Tools to Build Your Practice and Measure Client Success (Bloomberg Financial)

Ross Levin
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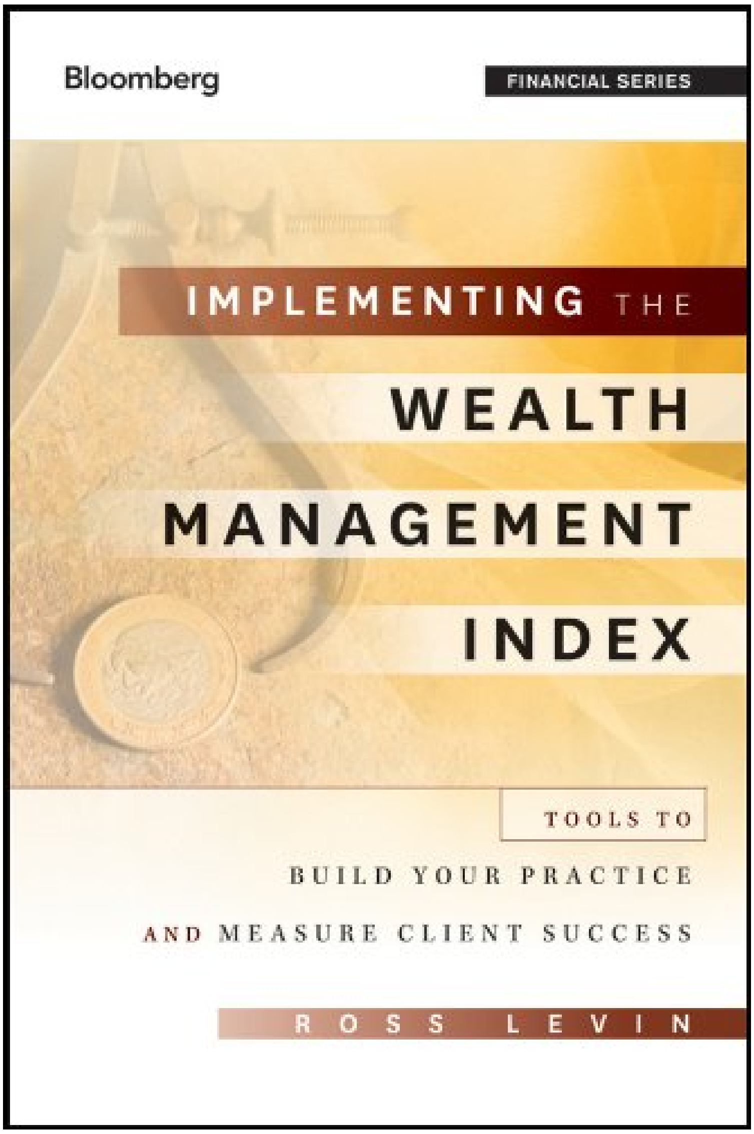

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Ross Levin : Implementing the Wealth Management Index: Tools to Build Your Practice and Measure Client Success (Bloomberg Financial) before purchasing it in order to gage whether or not it would be worth my time, and all praised Implementing the Wealth Management Index: Tools to Build Your Practice and Measure Client Success (Bloomberg Financial):

5 of 5 people found the following review helpful. Ross Levin Does It Again!By DonnaRoss Levin has been a leader in

the financial industry for over 20 years. I read his first book - The Wealth Management Index - in 1998, and I have heard him speak at conferences over the years. His new book - Implementing the Wealth Management Index - takes a huge leap forward from the first book. It explains all of the components of the Wealth Management Index, and gives insight on how to use the concepts with clients. The book is directed to financial advisors, but it is also appropriate for folks in the insurance and estate planning industries. The five components of the wealth management index are covered in great detail, including asset protection, disability and income protection, debt management, investment planning, and estate planning. I have been a financial advisor for 15 years, and I have read hundreds of finance books. There are only a few books that stand out as being exceptional, and Implementing the Wealth Management Index is one of them. Ross Levin's focus has always been on helping his clients achieve their financial and personal goals, and he generously shares his wisdom and expertise in this book.2 of 2 people found the following review helpful. Ross Levin's New Book is the Real DealBy CustomerThe wealth management industry is growing up. It's more than managing money, so much more. This book timely addresses the processes for comprehensive financial management and pulls it all together in an understandable format. It centers on a well thought out five component Wealth Management Index architecture that has been proven over many years in the trenches. The growth of his firm over the years proves it.I have his first book. This new one goes much deeper. It is a valuable resource that we are using right now in putting together our company's financial planning processes. Ross is a pioneer, and the "real deal". I firmly believe that to survive in this field, the firm of the future needs to deliver a comprehensive and consultative approach in client engagement. Implementing the Wealth Management Index is at the heart of that.0 of 0 people found the following review helpful. Five StarsBy J. WalkerFantastic road-map for running your wealth management firm.

The gold standard for measuring financial progress, updated for today's market From Ross Levin, a trusted financial planner, comes Implementing the Wealth Management Index. The new edition of the book Investment Advisor called a "landmark opus," this revised and updated volume expands upon his legendary Wealth Management Index tool. A benchmark system that, through a series of questions and evaluations, enables advisors to score their performance for individual clients, the tool is used by firms around the world. In this new edition, the index looks at asset protection, disability and income protection, debt management, investment planning, and estate planning. The new edition adds more how-to information, as well as actual client examples and case studies to show how Levin's firm successfully uses the index as a daily strategy. Asks the important questions, like "Did you use all reasonable means to reduce your taxes?" and "Have you established and funded all the necessary trusts? Have you made your desired gifts for this year? Newly revised and expanded for the first time since 1997 Essential guidance from a top man in the game, Implementing the Wealth Management Index is the one-stop resource for measuring client financial progress.

From the Inside FlapIn 1996, financial planning expert Ross Levinunveiled one of the most important tools of our time for tracking and measuring financial progress: the wealth management index. Now, inImplementing the Wealth Management Index, Levin has updated his revolutionary, and proven, techniques for the twenty-first century and the post-recession world. A benchmark system that uses a series of questions and evaluations to enable financial advisors to score the performance of individual clients, the index is currently used by firms around the world. This book applies it to the following areas: asset protection (preservation); disability and income protection (protection); debt management (leverage); investment planning (accumulation); and estate planning (distribution), providing a comprehensive look at every aspect of wealth management. Including how-to information alongside real-life client examples, the book teaches wealth managers and financial advisors how to understand their clients and get them where they want to be. Deceptively simple questions like "Did you use all reasonable means to reduce your taxes?" and "Have you established and funded all the necessary trusts?" can mean the difference between merely having wealth and maximizing its potential. With this book in hand, advisors can be sure that they are looking at client options from all angles. Essential and groundbreaking guidance from an internationally recognized expert in the field,Implementing the Wealth Management Index?is the one-stop resource for measuring client financial progress, and the one book the successful money manager can't afford to be without.From the Back CoverPraise for Implementing the Wealth Management Index "Implementing the Wealth Management Index seems to me to be a great way to tame the challenge of communicating and managing dozens or hundreds of financial issues in a client's life.?As a bonus, you get to look over the shoulder of one of the profession's leading thinkers as he evaluates his firm's internal management processes and thinks about how to approach virtually every aspect of the financial planning service." mdash;Bob Veres, Editor, Inside Information "Ross Levin has always been a thought leader in the financial planning business, and has always been incredibly generous with his insight and wisdom to help other planners and advisors who are trying to grow their businesses. The first edition of The Wealth Management Index was a breakthrough piece of thinking on how to deliver value to individuals and families. This version is a great enhancement to the original text because it incorporates even more practical ideas in an even more complex world. I urge all advisors, whether they're with independent or employee-owned firms, to get this book, take many notes, and implement the great ideas that Ross is offering up." mdash;Mark Tibergien, CEO, Pershing Advisor Solutions, a BNY Mellon company "A towering figure in the financial planning movement, Ross Levin understands that investors' goals go far beyond financial success. Implementing the Wealth Management Index updates his seminal work with even more actionable advice on how individuals can make smart money management their means to a more rewarding life." mdash;Don Phillips, Managing Director, Morningstar "With consumer trust in the financial advisor community still on the mend, and a legislative and regulatory environment focused on accountability and transparency, a guide that can bend advisors' businesses in new, client-centered directions is perhaps more timely and relevant today than ever. Implementing the Wealth Management Index is a compelling and practical model that espouses laser-like focus on client objectives and solutions using a transparent, balanced approach." mdash;Sean R. Walters, CAE, CEO/Executive Director, IMCA, Investment ManagementConsultants Association "Ross Levin gives us not merely a revision, but a new vision of how to build a successful practice and help your clients progress toward meaningful goals." mdash;Marv Tuttle, CAE, Executive Director/CEO, Financial Planning Association "Ross delivers in spades on his promise of turning concept into practice. I loved the originalissue of The Wealth Management Index and this update is even better. This is a must on the shelfof all practitioners; however, don't just buy the book; read and implement its ideas and watch your business grow." mdash;Harold Evensky, President, Evensky Katz; coauthor of The NewWealth Management "Ross hopes this book is a blessing to the planners that read it. I say it's a true blessing to theirclients. This book makes us all better." mdash;Marty Kurtz,About the AuthorRoss Levin, CFPreg;, is the Founding Principal and President of Accredited Investors Inc., and a nationally recognized expert in financial planning. He was named one of the five most influential people in financial planning by Financial Planning magazine and as one of the twenty-five most influential individuals in and around the advisory profession by Investment Advisor magazine. A much sought after speaker on financial matters, Levin has appeared in numerous publications, including the Wall Street Journal, Bloomberg Businessweek, Fortune, the New York Times, Newsweek, Barron's, and Money magazine, as well as on television and radio shows such as NBC Nightly News, The Oprah Winfrey Show, and American Public Media's Marketplace Money. Levin was the first recipient of the Financial Planning Association's Heart of Financial Planning Award.