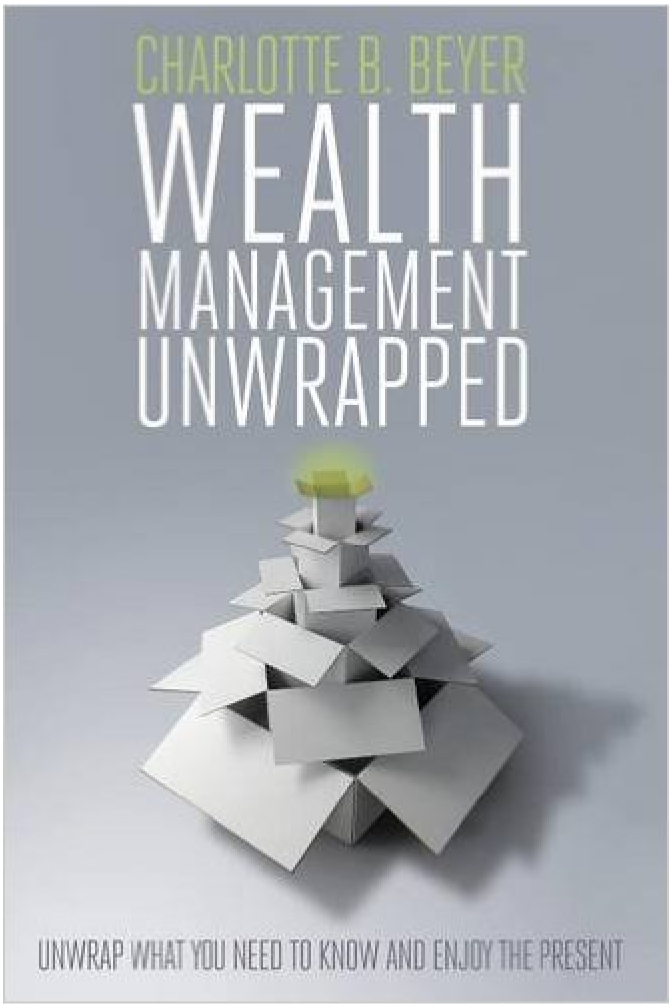
Wealth Management Unwrapped



Synopsis

The FIRST book to read before you hire - or fire - your advisor, Wealth Management Unwrapped is a comprehensive guide for both the newly wealthy and the experienced investor.In her new book, Wall Street veteran and Institute for Private Investors (IPI) founder Charlotte Beyer sheds light on the complex wealth management industry, outlines the responsibility that all investors have as 'CEOs' of their own wealth, and equips them with the tools to effectively manage their money."Short. Candid. Fun and easy reading. Full of good advice and useful insights."-Charles D. Ellis, author Winning the Loser's Game"Beyer's advice is occasionally blunt-and consistently useful. You will improve your chances of success if you find an advisor who provides the brand of well-informed straight talk that characterizes this book."-Martin Fridson, Barron's"A masterpiece that every investor should read and own."-Lloyd Hascoe, Hascoe AssociatesWealth Management Unwrapped is the accumulation of Beyer's extensive knowledge and experience observing high-net-worth investors and family offices. She strips away industry jargon, and empowers readers to find and build partnerships with the right financial advisors.Many of the questions Wealth Management Unwrapped will answer:â ¢ What kind of investor am I?â ¢ What is the difference between an advisor and a money manager?â ¢ How do I know whom to trust?â ¢ Why should I care about conflicts of interest?â ¢ How do I know if I might not prefer being a do-it yourself investor?â ¢ What are the best questions to ask when interviewing an advisor?â ¢ How do I know if I can trust the firm's disclosure on fees?

Book Information

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Customer Reviews

Three decades of serving individuals and families of significant wealth has taught me much about investing and more about the importance of the client/trusted advisor relationship. Most importantly, we must recognize that effectively serving clients starts with education. Education empowers clients, builds their confidence the process and leads them participate in the management of their wealth. Ultimately this creates a client/advisor relationship that is lasting, respectful and informed. While this book is aimed at individuals exploring the basic tenants of wealth management, we, as advisors, will be reminded of the lasting value of education.With "Wealth Management Unwrapped" Ms. Beyer has constructed a critical tool that empowers individuals to understand the responsibility of managing wealth. Starting with a curriculum of sorts, Ms. Beyer causes the reader to closely examine their own role in the process and what they should reasonably expect from a potential advisor. This is done through a series of exercises that lead the reader to address, develop and define their own goals and how to evaluate outcomes. After that foundation is built, the book moves to a clear and concise guide to more specific information about industry definitions, critical advisor attributes and finally making choices.As advisors, we can sometimes lose sight of the importance of creating a foundation of knowledge for our clients. Instead we may start in the wrong place early in the process. Sometimes diving into technical subjects that advisors work with everyday can leave potential clients confused and frustrated, although they may not show it. In her book, Ms.

Developement, Scrum, Project Management) The Public Wealth of Nations: How Management of Public Assets Can Boost or Bust Economic Growth The Ensemble Practice: A Team-Based Approach to Building a Superior Wealth Management Firm The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets Private Wealth Management: The Complete Reference for the Personal Financial Planner, Ninth Edition Wealth Management: The Financial Advisor's Guide to Investing and Managing Client Assets Breaking Through: Building a World Class Wealth Management Business Big Data in Banking: With Applications in Finance, Investment, Wealth and Asset Management (The Wiley Finance Series) The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets (CFA Institute Investment Series) You've Been Framed: How to Reframe Your Wealth Management Business and Renew Client Relationships Investing & Wealth Management (Audio Success Suite)