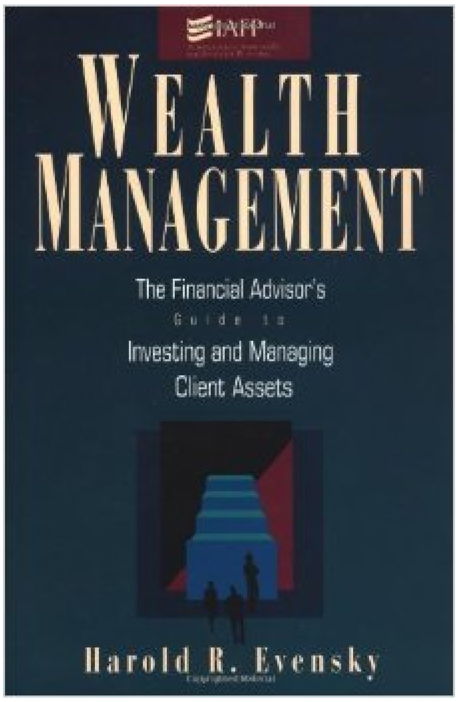
Wealth Management: The Financial Advisor's Guide To Investing And Managing Client Assets



Synopsis

``Harold’s diligent and scholarly approach to investing theory makes Wealth Management a thoughtful book that should be on every advisor’s reading list.’’--Charles R. Schwab, Chairman & CEO, The Charles Schwab Corporation. Wealth Management outlines the current state-of-the-art in financial planning, and describes respected financial planning speaker and author Harold Evensky’s effective, optimal asset allocation policy that is designed to account for each client’s unique goals and constraints. It provides you with concise yet thorough information on current investment theories, along with detailed reference for further study.

Book Information

Hardcover: 481 pages

Publisher: McGraw-Hill; 1 edition (August 1, 1997)

Language: English

ISBN-10: 0786304782

ISBN-13: 978-0786304783

Product Dimensions: 6.3 x 1.4 x 9 inches

Shipping Weight: 1.9 pounds

Average Customer Review: 5.0 out of 5 starsÂ Â See all reviewsÂ (4 customer reviews)

Best Sellers Rank: #443,205 in Books (See Top 100 in Books)   #104 inÂ Books > Business & Money > Finance > Wealth Management   #390 inÂ Books > Business & Money > Accounting > Financial   #3496 inÂ Books > Business & Money > Investing

Customer Reviews

I had expected a typical fluff, despite Evensky’s fine reputation. I has very surprised at this mixture of practical advice and theory. Pointers are given to other sources for those more theoretically inclined. Some of the practical advice (software recommendations and such) won’t age as gracefully as the text itself, these packages will become obsolete before the book. Nevertheless, I’d highly recommend it for anyone who is looking to understand the basics of risk/reward, the importance of asset allocation, and the theoretical material that led to these ideas.

Mr. Evensky’s book has had a profound impact on my wealth management philosophy. He is very effective in blending the broad scope of investment management theory with "real world", practical application. I found it particularly useful because it is not a book written by an academic who has never sat across the table from a client and held their hand through the good times and the tough.

This is a must read for any serious manager of wealth.A. Todd Black, CFP

When an author turns a very dry subject like wealth management into short stories, anecdotes and episodes, the result is a great book. Itâ ™s a book that lays down the responsibilities of a wealth counselor in a manner that keeps you glued to the text. One can easily see the amount of research that went into the manuscript. The key to wealth management has not changed much, though I never got to the complete the newer edition.

Harold generously shares his knowledge, not only in solid investment thought, but in practical application. If you’ve ever wanted to know how to practically apply investment research to your own portfolios, this is the book that will do it

The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets Wealth Management: The Financial Advisor’s Guide to Investing and Managing Client Assets The New Wealth Management: The Financial Advisor’s Guide to Managing and Investing Client Assets (CFA Institute Investment Series) Index Funds: Index Funds Investing Guide To Wealth Building Through Index Funds Investing With Index Funds Investing Strategies For Building Wealth Including ... Guide To Wealth Building With Index Funds) Stock Investing: The Revolutionary Stock Investing Strategies For Beginners - The Complete Guide To Get Started With Stock Investing And To Maximize Your ... Trading, Investing, Investing Basics) Simple Wealth, Inevitable Wealth: How You and Your Financial Advisor Can Grow Your Fortune in Stock Mutual Funds Investing 101: A Beginner’s Financial Guide for a Rich Life. The Basics on How to Make Money and Build a Wealthy Retirement. (Stocks, Bonds, Gold, Real Estate, Retirement, Assets, Wealth) The Essential Advisor: Building Value in the Investor-Advisor Relationship Building AS/400 Client Server Applications: Put ODBC and Client Access APIs to Work Project Planning and Control Using Oracle Primavera P6 Versions 8.1, 8.2 & 8.3 Professional Client & Optional Client Client Teaching Guides For Home Health Care (Gorman, Client Teaching Guides for Home Health Guides) You’ve Been Framed: How to Reframe Your Wealth Management Business and Renew Client Relationships The Public Wealth of Nations: How Management of Public Assets Can Boost or Bust Economic Growth The Book on Rental Property Investing: How to Create Wealth and Passive Income Through Smart Buy & Hold Real Estate Investing The Book on Rental Property Investing: How to Create Wealth and Passive Income Through Intelligent Buy & Hold Real Estate Investing! Investing: Learn How To Invest For Beginners, Learn To Generate Wealth And Grow Your Money For The Future (Investing

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