The Million Dollar Financial Advisor

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The White Coat Investor

The tools and techniques you need to be a top-producing financial advisor. How do you become a million-dollar producer, boost client satisfaction, and dramatically expand your business? The Financial Advisor’s Success Manual provides the answers to these all-important questions — along with the proven techniques and expert insights you need to maximize the profitability of your practice. Financial service firms traditionally aren’t designed for serious growth. But this book shows how to break that cycle and earn more — all while serving your clients better. You’ll learn to: Develop a differentiation strategy Effectively segment your book and analyze opportunities Define and implement your six core client-facing processes Balance the cost of services with the value delivered Formulate your business plan Enhance client loyalty Measure what matters Perfect your personal marketing and sales approach Packed with tables, graphs, forms, worksheets, sample letters, and more, The Financial Advisor’s Success Manual supplies everything you need to grow your business beyond your wildest expectations.

The Million Dollar Question

"Plateau to Pinnacle" is the story of Luke, a veteran financial advisor who's been in the business for 10 years. Luke always assumed he'd be a million-dollar producer but hits a plateau that ends up lasting for years. He's grown complacent and comfortable until a devastating event shatters his entire world. Feeling lost and wondering how he'll ever recover, he meets a powerful yet mysterious mentor, Victor Guise. Victor teaches Luke how to systematize his business, and together they lay the foundation he needs to reach the goal he'd all but abandoned. Luke learns much more than just business from his enigmatic mentor. As Victor helps Luke recognize and believe in his own potential again, his business changes and in the process, so does he. The book is content-rich and advisor-friendly. It pulls the content from each chapter into an easy-to-follow, step-by-step checklist for systematizing the advisor's practice.

Proven in the Trenches

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.

Ineffective Habits of Financial Advisors (and the Disciplines to Break Them)

John J. De Goey argues that financial advisors are changing the way they do business. Instead of earning commissions for placing products, they are increasingly charging fees for rendering more professional services. In the process, they are putting the interests of their clients ahead of the interests of their employers and product suppliers.

The Professional Financial Advisor IV

In medical training, our job is to hone our craft by learning and practicing the best possible medicine for our patients. Unfortunately, medical training isn't free. With the substantial debt burden facing graduating medical students, it has become increasingly important to know how to navigate the choppy waters of personal finance. With sharks in the water, no training on personal finance, and little time to spare on such an important topic, this short primer aims to teach you only what you need to know about personal finance so that you can focus on taking good care of patients. If you are ready to learn how to effectively pay down your student loans, invest efficiently, and achieve financial freedom early in your career - then this book is for you. Feel free to take a look at the introductory portion of the book through the "Look Inside" feature. Here are some of the essential topics you will learn in The Physician Philosopher's Guide to Personal Finance: ●Investing basics (compound interest, time in the market versus "timing" the market, etc.)●Investing specifics (types of vehicles, solid investment plans, and examples)●Specifics on how to attack your student loans●Paying off debt versus investing (or both) at various stages●Asset protection (life, disability, umbrella insurance, etc)●Where to get financial advice and identifying where conflicts of interest exist●Why lifestyle inflation matters after training and how it can wreck your lifePraise for The Physician Philosopher's Guide to Personal Finance: "I have frequently told physicians and dentists that the first really good personal finance and investing book you ever read is likely to be worth $2 Million to you over the course of your life This is a $2 Million book." - James M. Dahle, MD (The White Coat Investor)"Applying the Pareto principle, Dr. Turner has distilled his substantial knowledge and experience in personal finance into a no-nonsense book that a physician can easily read and understand in one insightful evening." Leif M. Dahleen, MD (Physician on FIRE)

Every Woman Should Know Her Options

David Mullen, Jr., whose financial advisor program at Merrill Lynch had a success rate twice the industry average, shows advisors how to effectively offer wealth and financial management services under one roof to better service clients. When exacting clients, high expectations, and the need to grow define your job, you need to be at the top of your game. That’s why more and more financial advisors are pooling resources to meet demand and joining teams in the process. Yet many advisory teams fail to reach their full potential. Why do some teams soar while others struggle? The Million-Dollar Financial Advisor Team takes you inside some of the highest functioning teams in the industry, uncovering the best practices that fuel success. Start, tweak, or rethink your own team by learning how to: Select the right structure Agree on a team vision and a plan to achieve it Define individual roles and responsibilities Retain top performers through thoughtful, results-based compensation Save time and effort by crafting efficient processes for every key task Catapult revenue with wealth-management offerings that clients will pay a premium for Expand your practice with great marketing By implementing effective team-building strategies and building a highly functioning team, you’ll gain more affluent clients—and serve them better—than you ever would alone.

The Gen-Savvy Financial Advisor

InThe Million-Dollar Financial Services Practice, author David J. Mullen, Jr. reveals how to become a top-producing financial advisor using the method he has taught at Merrill Lynch and is famous for in the industry. This comprehensive book combines marketing, prospecting, sales, and time management techniques into a system that will help readers build a successful and lucrative practice. Mullen gives financial advisors all the tools and guidance they need to: get the appointment build relationships convert prospects to client retain clients use niche marketing successfully balance current clients and prospects increase the products and services each client uses attract millionaire clients Containing templates, scripts, letters, and 15 tried-and-true Market Action Plans, this indispensable guide shows readers how to take their financial services practice to the million-dollar level and beyond.

85 Million Dollar Tips for Financial Advisors

If you are in professional sales, especially financial services, you may want to rethink your game plan. Even if you are successful, why not be a TOP PRODUCER, making more MONEY while having FUN? That is what 25-year financial industry veteran Don Watson reveals in Lessons of a Top Producer: The Financial Advisor's Playbook for the Million Dollar Year.

Seven Figure Pharmacist

Learn what makes a client trust you to be their financial advisor. Put the power of story telling into selling financial products. The authors explain the process of making these intuitive connections, then translate their findings into understandable and practical strategies that any financial professional can use. They present actual stories, including many by Warren Buffet, one of the greatest "storysellers" of all time. These actual stories can help financial pros tap into the "gut reaction" of different types of clients. the book also includes special topics on communicating to women, the 50+ market, and the affluent.

Plateau to Pinnacle

"If you care about your financial future and if you don't want to get ripped off by the financial industry, read this book now." (Daven Michaels, NY Times bestselling author) Are you investing with the help of financial advisers, money managers or bankers? Are you thinking about investing, but you don't know where to start and who to trust in the financial jungle out there? Are you a busy professional who hates financial mumbo-jumbo and doesn't have time for investing? Are you scared to invest because it seems too overwhelming and complex? The BAD news is that most financial advisers, gurus and other financial "experts" are out there to legally steal your invested money. That is why a typical investor loses more than one million dollars in his/her investing career (see pages 172-175). The GOOD news is that you can smile now because finally there is a simple solution. Robert Rolih will share with you the details and secret subtleties that will enable you to fire your financial adviser, take control of your money and investments and outperform the pros - while spending only a few hours per year. By reading The Million Dollar Decision, you'll finally discover how to make sure your invested money works for you and not for the financial industry: The Six Dark Forces of Investing: if you don't learn what these forces are, you will never be able to invest profitably. Get to know them, and Darth Vader will seem like a good guy to you. The Commission Camouflage Effect: learn how the financial industry takes most of your future returns - without you even being aware of it. The most important formula of your financial life: Financial Success Formula. This is an entirely new philosophy on personal finance and investing that will, quite literally, save you financially. If you have adult children, you will want to share it with them right away. Financial safety with the A.R.M.O.R. Formula: even if you are the kindest and most positive person, something unforeseen can happen that turns everything around. Use this simple formula to prevent financial disasters from disrupting your financial security. Selecting the right financial products and minimizing risk: stocks, bonds, mutual funds, index funds, gold, silver. Get a clear answer on how to make the right choices. Investing for retirement or to grow your wealth simply can't get easier! How to beat Richard Branson's speed of creating wealth with one smart move? No hype. Just facts. This will come as a total surprise for you. Short-Term Investing Slaughterhouse: learn the sad truth about short-term trading. If you are thinking about trading stocks, Forex, binary options and other instruments, this chapter will be a life saver. How to make the Million Dollar Decision, get out of the rigged game of investing and add a million to your net worth in just a couple of hours per year? By reading this book you'll have total confidence in yourself when investing and outperform even the experts in just a couple of hours per year. Add this book to cart now and make your Million Dollar Decision! "Being a doctor of medicine I have never enjoyed books about personal finance and investing. That was the first book that I not only read from cover to cover, but used it to change my investing plans. I cannot thank you enough for the information in your book. nDylaan Dowlati, MD, MBA-HCM "I thought I knew just about all there is to know about investing. But I put my emotions aside and listened to Robert's logic and I was stunned! I took immediate action to bring my investments in line with his recommendations. I believe this book really will be a Million Dollar Decision for me!" -Ralph Brogden, bestselling author

The 10X Financial Advisor

From successful financial consultant Bill Good, a new business book that updates his proven prospecting system for today's sales environment and explains how to find and cultivate clients in an era when cold calls are forbidden.

The Indispensable LinkedIn Sales Guide for Financial Advisors

Explaining difficult concepts in plain English with a breezy style, this third edition has new material covering new tax laws, retirement savings strategies, a chapter on identity theft, and question-and-answer sidebars.

The Physician Philosopher's Guide to

Personal Finance: The 20% of Personal Finance Doctors Need to Know to Get 80% of the Results

Author Matt Zagula is best known for helping hard-working people and business owners reach their lowest legal tax rate and deploying those tax savings into SMART tax-exempt assets for their future. In this book, he does not discuss the same old recycled financial planning ideas. Instead, he teaches you strategies similar to those being used by top executives and the wealthy elite so that more Americans can benefit from the same SMART retirement planning techniques. The tax code is clear: you are legally obligated to pay tax only once on the dollars you have. This book will make you and your money SMART so you can spend less on taxes, and have more for you!

Rule #1

The Marketing Guide for Financial Advisors uncovers the truth about how independent advisors really get new clients in a digital world. Learn what no one wants you to know about marketing, how to avoid wasting money on your marketing, and the secret to unlocking your marketing potential, including: Why digital marketing is so challenging in financial services How to create a website that converts Email marketing strategies for financial advisors Using social media to get in front of your ideal prospects Search engine optimization to get more traffic to your website Content strategy to start the conversation

Embracing a specialty to command higher fees Using webinars to warm up prospects In this exclusive guide, you'll learn proven strategies from top advisors to grow your firm and uncover a step-by-step process to build your marketing engine. About the Author Claire Akin, MBA grew up in the financial services industry working with her father, an independent financial advisor of over 35 years. She holds a bachelor's degree in economics and a master's of business administration. Claire founded Indigo Marketing Agency to help independent financial advisors reach more of their ideal clients. It's her mission to help financial advisors grow their firms through digital marketing.

The Financial Advisor's Success Manual

Selling is as old as civilization itself. Put in the simplest of terms, selling is the exchange of goods and services for something of value. To financial advisors, however, the sale is often seen in a negative light, and many cringe at the word "sell." Interestingly, the same advisors who shy away from the concept of selling are often those who find themselves selling every single day! Sometimes they're even participating in the selling process multiple times throughout the day--and they may not realize it. Asking for client referrals, developing strategic alliances, seeking and talking with new prospects are all obvious parts of the selling process, but selling happens every time you remind a client why it's a good choice to do business with you, too. The fact is that most CFAs(R), CFPs(R), CPAs, and other professionals did not obtain these titles because deep down they really wanted to be in sales. Most times, their interests tend more toward data, analysis, and more solitary orientations. Selling is probably the last thing those who entered these fields were thinking of doing. They may not have considered the "people" aspect of their chosen profession; the aspect that involves sales. For this reason, and some others, turning into a salesperson seems like a negative, degrading thing. Many advisors will conjure up the picture of the slimy used-car sales guy. It's time to recognize selling as the valuable activity that it is. It is a way to: Let people know who you are and what you do well. Get your message out to those who need it. Promote your planning process, wealth management services, or investment expertise. Use your relationship skills to close new business. Take your business to the next level. If you want to grow your business, the bottom line is that you--or someone on your team--need to sell, and to sell well. This book will offer guidance on how you can sell in a comfortable and effective manner.

The Psychology of Money

There have been big changes in consumers' buying habits, and financial services are no exception, says Cam Marston, a world-renowned expert on generational issues in the marketplace. Understanding clients' age-based points of view is an indispensable soft skill that you can use to establish connections and make sales. New attitudes about investing break down along generational lines and this book is the definitive guide to tailoring financial services and building relationships with clients based on these new generation-specific expectations and experiences. Whole chapters are devoted to each of the four generations - Matures, Baby Boomers, Generation Xers, and Millennials - and their unique approaches to finance and investing. Marston offers detailed guidelines and an arsenal of proven techniques to help the advisor best serve investors of all ages. Through this book, Marston conveys the changing demographics and shifting experiences that are giving many financial advisors anxiety they haven't felt since the Great Recession. But he also shares a path forward.

Smartest 401(k) Book You'll Ever Read

Success as a Financial Advisor For Dummies

Worry less. Plan more. Do you want a secure retirement, free from worry, stress, and confusion? The Bucket Plan® is a must-read book for anyone serious about creating a practical and sensible financial plan for his or her retirement years. The financialplanning process outlined in this book is based on a three-bucket philosophy of strategically positioning assets to plan for and mitigate the risks and dangers that can occur in retirement. Readers will learn: • The three biggest dangers for your financial future and how The Bucket Plan helps protect from them • A formula for calculating whether you will have an income deficit and, if so, how much money is needed to prevent it • A surefire way to avoid taking on too much investment risk on money you may need in the near future • Much, much more When readers strategically allocate their money using Jason Smith's three-bucket philosophy, they can create a plan that mitigates risk and offers an opportunity for growth into the future, allowing them to feel more secure about retirement.

The Supernova Advisor

A practical financial guide covers such topics as eliminating debt, investing simply, making sound financial decisions, and revolutionizing relationsips with the flow of money.

Hot Prospects

This book will change the way you think about and invest in your retirement savings plan-forever. Internationally bestselling author and consumer advocate Dan Solin challenges some basic and misguided assumptions about traditional retirement plans to reveal that: ? 401(k) and 403(b) plans are laden with Porky Pig fees, poor investment choices, and conflicts of interest. You may be better off just saying "No!" ? There is a simple way to make smart choices in these plans- and this book shows you exactly what to do and which funds to avoid. ? There is one investment that could be the key to a successful retirement plan. You can do it yourself, with pre-tax or after-tax money. Create your own, inflation-proof pension plan that is guaranteed to provide you with monthly income for as long as you live, and beyond! Smart Investing is not complicated. You have the power to make meaningful changes to your retirement savings plan-no matter what your age or financial status. "If you haven't taken a recent look at what your own retirement investments are doing and-perhaps even more important-how they are put together, reading Solin's smart little book might provide the impetus for action." -Miami Herald

What Your Financial Advisor Isn't Telling You

The best financial advisors are well equipped to succeed regardless of market conditions. Based on interviews with fifteen top advisors, each doing several million dollars worth of business every year, The Million-Dollar Financial Advisor distills their universal success principles into thirteen distinct lessons. Each is explained step-by step for immediate application by veteran and new financial professionals alike. The lessons cover: * Building and focusing on client relationships * Having a top advisor mindset * Developing a long-term approach * Specialization * Marketing * And much more The book also features two complete case studies. First there is the "best of the best" advisor whose incredible success showcases the power of all the book's principles working together in concert. The second is an account of a remarkable and inspiring career turn around and demonstrates that it's never too late to reinvent oneself. Brimming with practical advice from the author and expert insights from his interview subjects, The Million-Dollar Financial Advisor is a priceless success tool for any and all financial advisors.

Smart Retirement

Take your Supernova practice to even greater heights of performance and profitability The Supernova Multiplier provides expert guidance to the revolutionary wealth management model that has transformed the lives and businesses of financial professionals worldwide. The innovative Supernova method enables financial advisors to rapidly grow their business, efficiently manage time, and maximize client satisfaction. The Five Stars of the Supernova model—Segmentation, Organization, Planning, Acquisition, and Leadership—provide financial advisors with the tools and knowledge to propel their practices to new heights of performance. The acknowledged pioneer of the Supernova model, author Rob Knapp offers in-depth examination of every aspect of the Supernova model, from client experience to leadership development. This invaluable resource addresses significant issues facing disciples of the model, including areas of chronic underperformance, and delivers proven solutions that financial advisors can integrate into their practices. Detailed coverage of core elements, such as the Rule of Reciprocity, Gap Analysis and the Five Star Model, promotes critical analysis of advisor performance and builds the foundation for precise alignment to the essential Supernova principles. This indispensable book empowers current and prospective Supernova practitioners to: Build and optimize an efficient and profitable Supernova advisory practice Structure your practice around high-value activities that increase revenue and grow your business Maintain a predictable schedule of meaningful client contact Develop and implement proactive planning strategies with your team and client base. The Supernova model is not complex, but requires sustained and disciplined effort to achieve best results. The Supernova Multiplier: 7 Strategies for Financial Advisors to Grow Their Practices is the key to unlocking remarkable results and sustained achievement in advisory practices across the financial management industry that will differentiate you and your practice from the ordinary into the extraordinary.

The Million Dollar Decision

The Supernova Model is a client service, client acquisition, and practice management model that drives an explosive acceleration in revenue and client satisfaction by capitalizing upon the 80/20 Rule. First implemented by financial advisors at Merrill Lynch—under the leadership of author Rob Knapp—it has grown increasingly popular within the financial services industry. The Supernova Advisor skillfully outlines this proven model and reveals how it can be used to create an exceptional experience for your clients, while significantly growing your business.

The Million-dollar Financial Services Practice

Growth in the financial planning field has skyrocketed -- drawing professionals from accounting and financial services to investment management. Now there is a book that addresses the needs of individuals contemplating or beginning careers in financial planning. This book presents a blueprint for launching a successful future in a lucrative, exciting profession. Noted financial planning practitioner Jeffrey Rattiner covers everything aspiring and beginning planners need to know. He takes the reader through the basics of what financial planners do and provides insight about where the field is headed. Topics include education and certification requirements, options for specialization, fee structures, logistics and technology, compliance, and legal issues. Rattiner also shows planners the best methods for client prospecting and marketing, and lists helpful resources for ongoing education. This easy-to-use guide gives a direct, turnkey approach to entering the field and setting up a financial planning practice. Special forms, checklists, and other useful tools reinforce the hands-on appeal of this practical guide.

Lessons of a Top Producer

"Filled with easy-to-understand examples and women's stories of wealth-building challenges and successes, Itkins's advice shows you how to take your hard-earned money and grow it in the stock market using options to reduce risk. Whether you hire a financial advisor to manage your money or manage it yourself, this book will put you on the path of financial empowerment."--Back cover.

Retire Inspired

Ineffective Habits of Financial Advisors (and the Disciplines to Break Them) is based on a 15-year consulting program that Steve Moore has led for financial advisors. It details techniques for business analysis, elements of a strategic vision, characteristics of exceptional client service and strategies for acquiring high net worth clients. These are the factors which allow advisors to transform their business into an elite practice. Told through the story of "Jack," an advisor who represents your average financial advisor, each chapter begins with an ineffective practice: a focus on quantity over quality or using the "rainmaker approach" instead of a "team approach." Each bad habit is countered with a new discipline to improve business results and add value. For example, in chapter seven, Moore details a strategy of cold calling new prospects as a bad strategy and describes a system of working through current clients to form new relationships and partners as the best practice to follow. He then offers step-by-step advice as to how to begin this networking effect. Throughout each chapter, Moore includes anecdotes collected through both personal experience and stories he's heard from clients and colleagues, as well as question and answer segments, examples, and homework assignments.

The Truth about Money

How much money will you need to retire? One million dollars? Five million dollars? In The Million Dollar

Question, author and financial advisor Nicole N. Middendorf provides the answers to real-life money questions about everything from retirement to college loans and estate planning. Geared toward all ages and all financial situations, this guide jumpstarts your financial knowledge in an easy-to-understand way. It offers discussions of: the basics of making better financial choices marriage, divorce, and everything in between teaching healthy money habits to kids understanding the basics of investing business ownership retirement and beyond manage your future by helping to preserve your assets. The Million Dollar Question shows you how to prevent the most common money mistakes while at the same time creating a plan aimed at helping you get through each money stage of life. It helps you enjoy today and prepares you to take control of your financial future.

The Pocket Guide to Sales for Financial Advisors

In The Advisor Breakthrough, financial marketing expert Shawn Sparks shares the step-by-step principles for developing the ultimate financial advisory practice. Based on the lessons Shawn has learned from working with the country's top financial advisors over the past ten years, you will discover many of the most important top 1 percent advisor lessons. A few highlights include: Key methods of Marketing so you can attract the right people, and repel the wrong ones How to gain highly qualified and profitable referrals from your ideal clients A 6 point sales process that insures you will get the right prospects to become clients How to build an incredible team to help you scale your business to the highest level Learn about the Advisor curse and how to overcome it so you can get more done in less time The Advisor Breakthrough delivers a comprehensive plan for creating marketing, sales, and operations tactics that will help any financial advisor turn a business that owns them into a successful, sustainable one they love. Now is the time to run a business that truly supports the lifestyle you desire and allows you to reach your full potential.

Storyselling for Financial Advisors

The face of financial services has evolved – and, along with it, the very nature of financial advice. In an increasingly complex world where people are starving for someone they can trust, the time has come for financial advisors to rise to the occasion and reinvent the value they provide to better serve their clients. Of course, to make this evolutionary leap, advisors require a proven, time-tested strategy. A methodology established by one of the most successful advisors in the country and backed by decades of real-world application among thousands of advisors across the country. In Proven in the Trenches: 11 Principles to Maximize Advisor Value and Transform Your Firm's Future, advisors will receive an actionable game plan touching on the core dimensions of a highly-functioning financial services firm: • Understanding Investor Behavior • Blueprinting Your Life and Your Business • Attracting Talent by Growing Your Own • Putting Process Behind

Your People • Building a Brand that Connects and Converts • Wealth Planning and What It Takes to Revive Advisor Value • Creating a Compelling Client Experience • Evaluating Partnerships • Attracting New Clients and the Art of Ethical Persuasion • Plotting Your Succession • Making the Shift from Advisor to CEO

The Million-dollar Financial Advisor

Most Financial Advisors fail to run their practice like a business and consequently never live up to their full potential. Even worse they find themselves trapped by the demands of their clients and unable to lift the proverbial ceiling on their income. This book will take you on a journey through the proprietary Quantum Leap Success Model built to help financial advisors achieve massive and sustainable growth. So, you want to be a million-dollar producer or dare I say it, a multimillion-dollar producer. How do you get there? The simple answer is that you need a recipe. Many financial advisors toil in mediocrity for years haphazardly trying different ways to jump-start their business. They forge their path forward by feeling, or even worse by trial and error. They waste time, effort, and money, chasing every new idea, thinking that this time will be different. This time they will become the success that they always dreamed that they could be. Unfortunately, time and time again, they find themselves stuck in the cohort of the average. The good news is that you do not have to be average anymore. There is a model to build just about everything. If you want to build a house, you would be out of your mind to proceed without a blueprint. If you want to build a business, you can build a plan emulating the world's most successful companies. There is absolutely no difference in our business. If you want to be a financial advisor superstar, The 10X Financial Advisor provides you with a blueprint for success.In almost every profession, there is a cohort of people that make up the best of the best, la creme de la creme. The rest of the surrounding people are left looking in with wonder. How did they achieve such fantastic success? How did they get to such an extraordinary level of talent? You could very well be talking about the computer scientist that can code ten times faster and more proficient than their peers or the salesperson that earns 10x more than the others. Almost everywhere you look, there are people who have broken out of the mold of mediocrity and go on to do something truly great within their respective spheres. How about your company? At most financial firms, there is one, or perhaps a few individuals who are ten times more successful than all the other advisors. What are they doing differently than you? Has it ever felt like you work just as hard, but do not even come close to the same output? The 10X Financial Advisor will provide you with a clear, simple to follow, formulaic approach to massively growing and scaling your financial services business. By the time you finish this book you will possess the blueprint that will allow you to transform your practice and turn it into a thriving and sustainable business. You can be the one in your company that everyone else is envious of and looks up to. You will possess the knowledge to accomplish the very pinnacle of success within financial services. You can become a cardcarrying member of the 10X club.

The Million-Dollar Financial Advisor Team

When you hear the word retirement, you probably don't imagine yourself scrambling to pay your bills in your golden years. But for too many Americans, that's the fate that awaits unless they take steps now to plan for the future. Whether you're twenty five and starting your first job or fifty five and watching the career clock start to wind down, today is the day to get serious about your retirement. In Retire Inspired, Chris Hogan teaches that retirement isn't an age; it's a financial number an amount you need to live the life in retirement that you've always dreamed of. With clear investing concepts and strategies, Chris will educate and empower you to make your own investing decisions, set reasonable expectations for your spouse and family, and build a dream team of experts to get you there. You don't have to retire broke, stressed, and working long after you want to. You can retire inspired!

Retirement Reality Check

Build a lucrative financial-services practice with the proven tactical processes in Million Dollar Financial Services Practice. Updated with new strategies for acquiring clients, using social media, and more, the author provides action plans to guide any level of financial professional to the million-dollar level and beyond.

The Million-Dollar Financial Services Practice

The Marketing Guide For Financial Advisors

How many of us follow the same advice our grandparents followed: contribute whatever we can to our 401(k) and hope it's enough when the time comes to retire? Millions of Americans did just that and in 2008, after years of saving the conventional way, the market crashed and took their entire nest egg, seemingly overnight. Josh Jalinski, host of the popular Financial Quarterback™ radio program, offers his proven system for a SWAN (sleep-well-at-night) retirement that works for people in all stages of their careers. Retirement Reality Check challenges fifty years of conventional retirement planning with fresh strategies tailored to today's volatile economic climate: The old warhorse 401(k) is great but nowhere near enough for most retirees and definitely not reliable. It's okay to spend some of your IRA money before you are 70½. You can spend a lot more than 4 percent a year of your savings when you retire. Don't shun annuities and whole life insurance policies; use the right ones and use them cleverly. Retirement should be a time to enjoy family, friends, and travel, without worrying about your financial security. Josh Jalinski shows you how to maximize your retirement spending, while still having something to leave behind to your loved ones and favorite causes. It's time create a new paradigm, one that will stand up against market volatility and be there when it’s time to enjoy the years you worked so hard for. Do you have enough saved to enjoy your retirement? Will you be able to fund your bucket list? Are you prepared to for the tax increases and medical bills that come with retirement? In this practical new guide, Jalinski guides you through his proven system for planning for a secure retirement that lets you enjoy your money, including: Tax-saving strategies to maximize the amount of money you have available to spend on experiences, travel, and expenses Understanding the right investment mix, depending on your individual circumstances How saving cash and different life insurance options help you weather volatility and ensure you can pass wealth on to family members

The Advisor Breakthrough

The Supernova Multiplier

Doing well with money isn’t necessarily about what you know. It’s about how you behave. And behavior is hard to teach, even to really smart people. Money—investing, personal finance, and business decisions—is typically taught as a math-based field, where data and formulas tell us exactly what to do. But in the real world people don’t make financial decisions on a spreadsheet. They make them at the dinner table, or in a meeting room, where personal history, your own unique view of the world, ego, pride, marketing, and odd incentives are scrambled together. In The Psychology of Money, award-winning author Morgan Housel shares 19 short stories exploring the strange ways people think about money and teaches you how to make better sense of one of life’s most important topics.

Financial Peace Revisited

Written by a practicing emergency physician, The White Coat Investor is a high-yield manual that specifically deals with the financial issues facing medical students, residents, physicians, dentists, and similar high-income professionals. Doctors are highly-educated and extensively trained at making difficult diagnoses and performing life saving procedures. However, they receive little to no training in business, personal finance, investing, insurance, taxes, estate planning, and asset protection. This book fills in the gaps and will teach you to use your high income to escape from your student loans, provide for your family, build wealth, and stop getting ripped off by unscrupulous financial professionals. Straight talk and clear explanations allow the book to be easily digested by a novice to the subject matter yet the book also contains advanced concepts specific to physicians you won't find in other financial books. This book will teach you how to: Graduate from medical school with as little debt as possible Escape from student loans within two to five years of residency graduation Purchase the right types and amounts of insurance Decide when to buy a house and how much to spend on it Learn to invest in a sensible, low-cost and effective manner with or without the assistance of an advisor Avoid investments which are designed to be sold, not bought Select advisors who give great service and advice at a fair price Become a millionaire within five to ten years of residency graduation Use a "Backdoor Roth IRA" and "Stealth IRA" to boost your retirement funds and decrease your taxes Protect your hard-won assets from professional and personal lawsuits Avoid estate taxes, avoid probate, and ensure your children and your money go where you want when you die Minimize your tax burden, keeping more of your hard-earned money Decide between an employee job and an independent contractor job Choose between sole proprietorship, Limited Liability Company, S Corporation, and C Corporation Take a look at the first pages of the book by clicking on the Look Inside feature Praise For The White Coat Investor "Much of my financial planning practice is helping doctors to correct mistakes that reading this book would have avoided in the first place." - Allan S. Roth, MBA, CPA, CFP(R), Author of How a Second Grader Beats Wall Street "Jim Dahle has done a lot of thinking about the peculiar financial problems facing physicians, and you, lucky reader, are about to reap the bounty of both his experience and his research." - William J. Bernstein, MD, Author of The Investor's Manifesto and seven other investing books "This book should be in every career counselor's office and delivered with every medical degree." - Rick Van Ness, Author of Common Sense Investing "The White Coat Investor provides an expert consult for your finances. I now feel confident I can be a millionaire at 40 without feeling like a jerk." - Joe Jones, DO "Jim Dahle has done for physician financial illiteracy what penicillin did for neurosyphilis." - Dennis Bethel, MD "An excellent practical personal finance guide for physicians in training and in practice from a non biased source we can actually trust." - Greg E Wilde, M.D Scroll up, click the buy button, and get started today!

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The Bucket Plan®

In this book, self-made millionaire Phil Towns will show you how he turned $1,000 into $1 million in only five years, and then proceeded to make many millions more. Before I became "Phil Town, teacher of investing principles to more than 500,000 people a year," I was a lot like you: someone who viewed individual stock investing as way too hard to do successfully. As a guy who barely made a living as a river guide, I considered the whole process pretty impenetrable, and I was convinced that to do it right you had to make it a full-time job. Me, I was more interested in having full-time fun. So I was tempted to do what you're probably doing right now: letting some mutual fund manager worry about growing your nest egg. Let me tell you why that decision could one day make you absolutely miserable. The fact is, because of natural market cycles, the mutual fund industry is likely to soon be facing twenty years of flat returns. That means that if you've got your nest egg tucked away in funds—especially the type found in most 401ks—your egg won't get much bigger than it is now. Translation: Get ready for a retirement filled with lots of cold cuts, plenty of quality TV-watching time, and a place to live that's too small to accommodate your visiting kids. I came to investing as a person who wasn't great at math, possessed zero extra cash, and wanted a life—not an extra three hours of work to do every day. Fortunately, I was introduced to The Rule. Rule #1, as famed investor Warren Buffett will tell you, is don't lose money. Through an intriguing process that I'll clarify in this book, not losing money results in making more money than you ever imagined. What it comes down to is buying shares of companies only when the numbers—and the intangibles—are on your side. If that sounds too good to be true, it's because the mind-set I'll be introducing you to leads not to bets but to certainties. Believe me, if there were anything genius-level about this, I'd still be a river guide collecting unemployment much of the year. Part of the secret is thinking of yourself as a business owner rather than a stock investor. Part is taking advantage of today's new Internet tools, which drastically reduce the "homework factor." (We're talking a few minutes, tops.) Part is knowing the only five numbers that really count in valuing a potential investment. And part—maybe the most important part—is using the risk-free Rule #1 approach to consistently pay a mere 50 cents to buy a dollar's worth of a business. What I won't waste your time with is fluff: a lot of vague parables reminding you of what you already know and leaving you exactly where you started. This is the real deal, folks: a start-to-finish, one-baby-step-at-a-time approach that will allow you to retire ten years sooner than you planned, with more creature comforts than you ever imagined.

Getting Started as a Financial Planner

Protect your money with this "accessible and practical" guide to hiring and working with financial advisors (Publishers Weekly, starred review). Hiring a trained expert to safeguard and grow your wealth seems like a foolproof decision, but it can go awry for many people. You should never blindly trust that your advisor has your best interests at heart—and while there are many benefits to working with a financial pro, there are some things you should know first. Drawing on her insider's knowledge of how the financial advice profession really works, Liz Davidson shows how to judge whether an advisor is going to help or harm your savings. This no-nonsense guide covers questions such as: How should you decide if you really need an advisor? What financial moves can you make without their help? What important questions should you ask before trusting them with your money? What are the red flags you should run from? What does all their jargon really mean? Learn how to take control of your financial well-being—either with a financial advisor or without one. "This book is mandatory reading for anyone who wants a better understanding of how to manage their money." —Mary Beth Franklin, InvestmentNews "Valuable tools for managing one's personal finances for maximum results." —Publishers Weekly, starred review