



Getting Started as a Financial Planner (Bloomberg)

Jeffrey H. Rattiner

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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 one needs 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 to attain success in this high-growth profession.

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