



Building a High-End Financial Services Practice: Proven Techniques for Planners, Wealth Managers, and Other Advisers (Bloomberg)

Cliff Oberlin, Jill Powers

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Delivered with gusto and inspiration from two practicing planners, "Building a High-End Financial Services Practice is for aspiring and current financial planners who want to capture high-income clients and build relationships that are profitable in both up and down markets. The book gives advice about dealing with market volatility, new technology hurdles, more--and more-complex--financial products, and competition that seem to be coming out of the woodwork. It also contains invaluable advice on building lucrative alliances with other professionals. In addition, the authors include exclusive surveys of top financial planners and industry studies that identify trends, opportunities, and successful strategies. For those looking to manage a financial business for maximum efficiency, "Building a High-End Financial Services Practice lays out the map that will ensure success down the road.

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