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To succeed in today's radically new environment, financial advisors must first transform the way they communicate. In The Financial Professional's Guide to Communication, one of the world's leading experts on the financial client relationship shows them how to do precisely that. Drawing on his experience training elite financial professionals worldwide, Bob Finder shows how to actively listen, speak plainly with precision and passion, and engage clients with uncommon effectiveness.

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Author. Carolyn Rosenblatt has more than forty-five years of experience in her combined professions of nursing and legal practice. She is the co-founder of AgingParents.com and AgingInvestor.com, and she is the author of both The Family Guide to Aging Parents and The American Bar Association publication Working with Aging Clients: A Guide for Lawyers, Business, and Financial Professionals.

Today, financial clients are profoundly skeptical. They've been burned. Their consultants and advisors talk too much, use too much confusing technical jargon, work from too many

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boilerplate scripts, repeat too many generic caveats and useless disclaimers. Above all, clients say, their advisors don't listen well, and don't link their own needs and views to the recommendations they present. To succeed in today's radically new environment, financial advisors must first transform the way they communicate. In The Financial Professional's Guide to Communication, one of the world's leading experts on the financial client relationship shows them how to do precisely that. Drawing on his experience training elite financial professionals worldwide, Bob Finder shows how to actively listen, speak plainly with precision and passion, and engage clients with uncommon effectiveness. Finder demonstrates how to focus relentlessly on what

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matters most to each individual client, and then deliver intensely relevant recommendations with clarity and impact, in your own voice. You'll learn how to bring imagination, creativity, and even entertainment to your presentations and conversations, and use constructive criticism to keep improving with every new client meeting. Using these proven techniques, you can deliver truly extraordinary levels of professionalism and service, gain the powerful new competitive edge you're desperately searching for – and earn equally powerful rewards for yourself.

Expert advice for financial advisors looking to make the most of social media platforms Social media is everywhere. 3.5 billion pieces of content are shared on Facebook each

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week, 22 million professionals are networking on LinkedIn, and 140 million tweets are posted everyday. The opportunities these platforms present for financial advisors are huge, but most advisors have no idea how to use them to build bigger, stronger client bases. The Social Media Handbook for Financial Advisors: How to Use Facebook, Twitter, and LinkedIn to Build and Grow Your Business shows how to make the most of these new tools, offering invaluable advice about how to connect with potential clients in the twenty first century. For most advisors, converting prospects into clients is their top priority, and social media presents incredible opportunities for sealing the deal. Sales don't happen because clients are impressed by complicated charts, they happen because

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they're impressed by your social media presence, and by properly understanding how to make these new platforms work for you, you'll be positioned to see your business boom. Designed to teach financial advisors how to use social media to better market their services to attract new clients and referrals. Presents expert communication advice from top financial advisor coach Matthew Halloran. Categorizes communicators in a unique new way. Teaches financial advisors how to use social media in new, highly effective ways that they've never even considered. An essential resource for wealth managers and financial advisors looking to amplify their marketing message and raise their visibility in a crowded marketplace, *The Social Media*

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Handbook for Financial Advisors is the only book you need to make yourself heard.

The Professional's Guide to Financial Services Marketing is directed to any financial services professional—from

individual representatives to executives of large financial services companies—who is looking for better ways to create the relevant marketplace differentiation and competitive advantage needed to increase productivity and profitability.

The purpose of this book is not to provide a how-to manual, but rather to offer practical information, examples, and thought-provoking tips that provide ideas and insights that will enable financial services professionals to improve their own marketing approaches and achieve ambitious

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marketing goals. With examples drawn from basic marketing approaches and successful consumer marketing, this book provides a fresh perspective on a variety of marketing issues that can make a significant difference to corporate success.

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

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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

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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.

An all-encompassing guide to the elements and basics of fairvalue With the important role fair value is playing in the creation of a converged set of

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global accounting standards, demand for products in this category is growing spectacularly. The elements and basics of fair value are covered, including risk, dealing with the SEC, and details on legal responsibility. In addition, sample financial statements are included, along with tables, recommended applicable techniques, and management checklists for those who are responsible for preparing and approving of financial statements. Written by the Chairman and co-CEO of the International Association of Consultants, Valuators and Analysts (IACVA) Includes sample financial statements of both U.S. and foreign companies Appropriate for anyone involved professionally with finance—managers, accountants, investors, bankers, instructors, and

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students. The Professional's Guide to Fair Value is a reliable reference on the ins and outs of fair value financial disclosure.

Having the right CFO is a critical component for every company's success. Dergel provides CFOs and those in the making with a strategic blueprint to benefit their companies and their careers. He reveals how to build a strong, successful career plan with guidance on team building and management of the multiple relationships that CFOs face on a daily basis, plus how to balance one's work and personal life.

A no-nonsense guide to quickly finding and evaluating the quality and usefulness of a site Written by two of the industry's leading researchers, this

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book helps professionals evaluate, target, and locate the best financial and business Web sites. The authors reveal tips and traps and recommend favorite sites, including a comprehensive review of the most important financial sites on the Internet. Eva Lang (Memphis, TN) is a nationally recognized expert on electronic research for business valuation and litigation support services. She currently serves as Chief Operating Officer of the Financial Consulting Group, the largest alliance of business valuation and consulting firms in the U.S. Jan Tudor (Portland, OR) is President of JT Research and a popular speaker on research strategies on the Internet.

The LinkedIn Guide for Financial Advisors offers step-by-step

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Instructions for mastering the world's largest professional network. Filled with relevant examples and success stories from independent financial advisors, the guide reviews how to optimize your LinkedIn Profile, expand your network, search for and identify qualified prospects, as well as the art of asking for an introduction from someone who knows and trusts you. Finally, the book offers a proven strategy for using content marketing on LinkedIn to attract new leads. Updated and expanded with new strategies for 2017.

Accounting for Real Estate Transactions, Second Edition is an up-to-date, comprehensive reference guide, specifically written to help professionals understand and apply the accounting rules relating to real

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estate transactions. This book provides financial professionals with a powerful tool to evaluate the accounting consequences of specific deals, enabling them to structure transactions with the accounting consequences in mind, and to account for them in accordance with US GAAP. Accountants and auditors are provided with major concepts, clear and concise explanations of real estate accounting rules, detailed applications of US GAAP, flowcharts, and exhaustive cross-references of the authoritative literature.

A must-read for financial professionals and serious investors alike, this one-stop resource offers valuable insight into complex and fast-changing financial markets and advisory markets. It provides in-depth coverage

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of all the topics key to personal finance, including record-keeping, present and future value in investing, financial career planning, educational planning, cash management, consumer credit, housing, insurance, investment choices, retirement planning, estate planning, tax issues and much more. Packed with helpful tips and lessons, this comprehensive handbook will help professional investors in advising customers as well as provide relevant, cutting-edge information for independent investors.

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