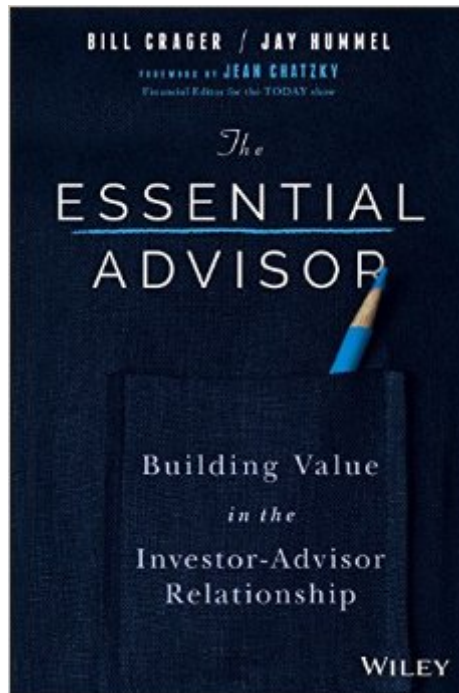


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The Essential Advisor: Building Value In The Investor-Advisor Relationship



Synopsis

Leverage the financial services evolution to maximize your firm's value The Essential Advisor presents an insightful handbook for advisors looking to navigate the changing face of financial services. The industry is evolving, consumers are evolving, and many advisors are being left behind as old methods become less and less relevant. This book shows you how to turn this shift into a positive, by positioning your firm to maximize these new opportunities, and deliver the results and experience increasingly expected of financial advisors. You'll learn how to provide the transparency, hands-on interaction, and around-the-clock access today's clients demand, and how to consistently deliver service that robo-advisors cannot duplicate. Emerging technologies do not have to be a threat to your practice—they are tools that represent opportunities to provide greater service to your clients, and smart technology integration will be a hallmark of firms that survive the shift. This guide provides a clear vision of the future of financial services, and an indispensable management framework for maximizing your firm's future value. Advisors are increasingly confused about what clients are seeking, and clients are equally confused about what advisory firms offer that alternatives cannot. This book helps clear the air on both sides by examining the client's perspective of financial services, and helping advisors better communicate their strengths. Articulate the value of your services Leverage new technology to complement your practice Capitalize on opportunities and maximize your firm's value Position your firm to benefit from the changing consumer population Financial advisors can only grow their businesses if clients know what they do, know how to hire them, and can access them affordably. The Essential Advisor shows you to bring your firm into the future successfully.

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Customer Reviews

Great and timely addition to the collection of books on the business of financial advice. Although it is relatively early in the current digital evolution of the industry, Crager and Hummel do a great job of anticipating the results and helping to define the essential value proposition of the Financial Advisor. I particularly appreciated the addition of the consumer perspective • written by Pam Krueger that strips away the industry jargon and summarizes key concepts from the perspective of the end user of financial advice- the client.

Forward looking book which anticipates many of the changes that advisors will have to go through in order to be relevant in today's ever-evolving digital age. The language and examples in the work are both advisor and consumer friendly. It will be a wake-up call for many advisors who have relied on traditional methods of garnering and keeping clients. It will also provide opportunity for consumers to shape their own value-based criteria for a present or future advisor relationship.

Well written and informative. This book will serve as a guide for advisors looking to provide true value to their investors and will provide valuable insight to investors looking for clarity around what they should be looking for in an advisor relationship. Can't wait to share this book with my dad who often wonders what he should expect from his financial advisor when there are so many do-it-yourself tools in the marketplace. Great read.

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