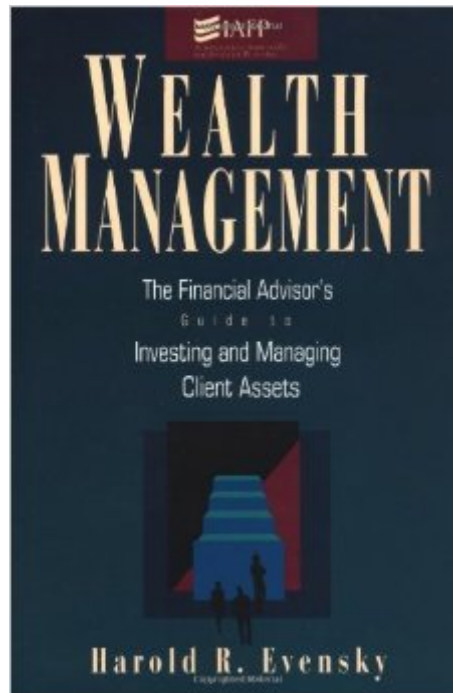


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# Wealth Management: The Financial Advisor's Guide To Investing And Managing Client Assets



## Synopsis

“Harold’s diligent and scholarly approach to investing theory makes *Wealth Management* a thoughtful book that should be on every advisor’s reading list.”--Charles R. Schwab, Chairman & CEO, The Charles Schwab Corporation. *Wealth Management* outlines the current state-of-the-art in financial planning, and describes respected financial planning speaker and author Harold Evensky’s effective, optimal asset allocation policy that is designed to account for each client’s unique goals and constraints. It provides you with concise yet thorough information on current investment theories, along with detailed reference for further study.

## Book Information

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## Customer Reviews

I had expected a typical fluff, despite Evensky’s fine reputation. I was very surprised at this mixture of practical advice and theory. Pointers are given to other sources for those more theoretically inclined. Some of the practical advice (software recommendations and such) won’t age as gracefully as the text itself, these packages will become obsolete before the book. Nevertheless, I’d highly recommend it for anyone who is looking to understand the basics of risk/reward, the importance of asset allocation, and the theoretical material that led to these ideas.

Mr. Evensky’s book has had a profound impact on my wealth management philosophy. He is very effective in blending the broad scope of investment management theory with "real world", practical application. I found it particularly useful because it is not a book written by an academic who has never sat across the table from a client and held their hand through the good times and the tough.

This is a must read for any serious manager of wealth. A. Todd Black, CFP

When an author turns a very dry subject like wealth management into short stories, anecdotes and episodes, the result is a great book. It's a book that lays down the responsibilities of a wealth counselor in a manner that keeps you glued to the text. One can easily see the amount of research that went into the manuscript. The key to wealth management has not changed much, though I never got to the complete the newer edition.

Harold generously shares his knowledge, not only in solid investment thought, but in practical application. If you've ever wanted to know how to practically apply investment research to your own portfolios, this is the book that will do it

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