

1. Record Nr.	UNINA9910139718903321
Autore	Noonan Timothy <1963->
Titolo	Someday rich : planning for sustainable tomorrows today // Timothy Noonan, Matt Smith
Pubbl/distr/stampa	Hoboken, New Jersey : , : John Wiley & Sons, Inc., , 2012 ©2012
ISBN	1-118-16751-1 1-119-20082-2 1-283-31605-6 9786613316059 1-118-16752-X
Descrizione fisica	1 online resource (316 p.)
Collana	Wiley Finance
Classificazione	BUS027000
Disciplina	332.02400973 332.6
Soggetti	Finance, Personal - United States Financial security - United States Financial planners - United States Portfolio management - United States Financial services industry - United States
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Includes index.
Nota di contenuto	Someday Rich; Contents; Foreword; Preface; Acknowledgments; Introduction; CHAPTER 1 Time for a Real Conversation; CHAPTER 2 How We Got Here; CHAPTER 3 The Right Clients; CHAPTER 4 Connecting the Dots; CHAPTER 5 The Personal Asset Liability Model-Funded Status; CHAPTER 6 The Personal Asset Liability Model-Investment Plan; CHAPTER 7 Making a Good Business of Giving Good Advice; CHAPTER 8 Investor Archetypes; CHAPTER 9 Tripping Over the Finish Line; CHAPTER 10 On Shaping One's Future; CHAPTER 11 Building a Simple and Powerful Solution for Retirement Saving-Russell's Approach to Target Date Funds CHAPTER 12 Investment Aspects of Longevity RiskCHAPTER 13 Mismeasurement of Risk in Financial Planning-A Lesson in Risk

Decomposition; CHAPTER 14 Modern Portfolio Decumulation-A New Strategy for Managing Retirement Income; APPENDIX A Lessons Learned from Retirement Income Research; APPENDIX B The New Language of Retirement; About the Authors; Index

Sommario/riassunto

To truly be successful, today's financial advisor must strike the right balance between effectively engaging with his or her clients and finding meaningful ways to maintain their financial security. By framing your mission in this way, you can help your clients clarify their vision, build a plan to achieve it, and manage that plan so they stay on track. Nobody understands this better than authors Timothy Noonan and Matt Smith—two seasoned financial professionals with over five decades of combined experience working in the asset management business. And now, in *Someday Rich*, they show financi
