

| | |
|-------------------------|--|
| 1. Record Nr. | UNINA9910139908103321 |
| Autore | Brandon E. Denby <1927-> |
| Titolo | The history of financial planning [[electronic resource]] : the transformation of financial services // E. Denby Brandon, Jr., H. Oliver Welch |
| Pubbl/distr/stampa | Hoboken, NJ, : John Wiley & Sons, c2008 |
| ISBN | 1-119-20312-0 9786612303340 1-282-30334-1 |
| Edizione | [1st ed.] |
| Descrizione fisica | 1 online resource (299 p.) |
| Collana | Wiley Finance |
| Altri autori (Persone) | WelchH. Oliver <1935-> |
| Disciplina | 332.6 332.62 |
| Soggetti | Financial planners - History Financial services industry - History Electronic books. |
| Lingua di pubblicazione | Inglese |
| Formato | Materiale a stampa |
| Livello bibliografico | Monografia |
| Note generali | Description based upon print version of record. |
| Nota di bibliografia | Includes bibliographical references and index. |
| Nota di contenuto | ""The History of Financial Planning: The Transformation of Financial Services""; ""Contents""; ""Foreword""; ""Preface""; ""Acknowledgments""; ""Chapter 1: A New Profession Emerges""; ""Before the Revolution""; ""A Meeting of the Minds""; ""The First Challenges""; ""A College Takes Shape""; ""Chapter 2: Building a Profession""; ""Defending a Designation""; ""Breaking Away""; ""Coming Together, Growing Apart""; ""Financial Crisis and Upheaval at the IAFP""; ""Financial Crisis at the College""; ""A Creed and a Curriculum""; ""Change and Growth at the College""; ""The Anthes Years"" ""The ICFP Forges a Separate Identity""""Newmark at the Wheel""; ""Return to Denver""; ""Chapter 3: Growing Pains""; ""Changing the Message, Changing Attitudes""; ""The SRO Debate and the a€œReal Thinga€?""; ""Unsettled Times at the IAFP""; ""Education and Ethics at the ICFP""; ""Getting Off the Gravy Train""; ""A Board of Standards Emerges""; ""The College Hits Its Stride""; ""Chapter 4: One Profession, One Designation""; ""The Challenge to a€œUnify and Professionalizea €?""; ""The Joint Organization Committee""; ""Rebuilding Separately""; |

""Strengthening Professional Standards""
 ""College for Financial Planning Makes Key Moves"" ""The Personal Economic Summit""; ""New Directions""; ""The Foundation for Financial Planning""; ""Storm over a€œCFP Litea€?""; ""Unification Revisited""; ""Chapter 5: Responding to New Challenges""; ""Building a New Organization""; ""CFP Board Fleshes Out Its Mission""; ""Crisis and Catastrophe""; ""Favorable Signs""; ""Financial Planning Standards Board""; ""Raising the Bar for Education and Ethics""; ""The Broker-Dealer Exemption""; ""Global Financial Crisis""; ""Transformation and Opportunity""; ""Chapter 6: Global Expansion""
 ""First Forays"" ""Financial Planning Comes to Australia""; ""Japan Joins the Movement""; ""IBCFP Takes Charge""; ""Global Growth Accelerates""; ""ISO Standard: Complement or Competition?""; ""Regulation and Legislation""; ""FPSB: From Concept to Reality""; ""Launched at Last""; ""A Tiger in the East""; ""And a Celtic Tiger""; ""Conditions for Success""; ""A Global Standard Emerges""; ""Chapter 7: Theory, Technology, and Process""; ""The Technology Revolution""; ""The Benefits of Diversification: Modern Portfolio Theory""; ""The Probability Approach: Monte Carlo Simulation""
 ""The Balancing Act: Asset Allocation"" ""Behavioral Finance""; ""Life Planning and Interior Finance""; ""A Proliferation of Practice Models""; ""Chapter 8: The Quest for Professional Status""; ""The Education of a Financial Planner""; ""Educational Opportunities Expand""; ""Examination: Proving Mastery""; ""Experience in the Practice""; ""Ethical Standards: The Early Years""; ""Ethical Standards: A New Watchdog""; ""Ethical Standards: Strengthening the Code""; ""Ethical Standards: A Fiduciary Obligation""; ""A Single Designation""; ""The Compensation Question""; ""Government Regulation""
 ""Serving a Social Benefit""

Sommario/riassunto

The first book to provide a comprehensive history of the financial planning profession. The financial services field has been revolutionized in the last quarter of the twentieth century by the financial planning profession. So much has happened in so little time that it has been difficult to keep up with the events and key players that make up the world of financial planning. The History of Financial Planning is the first book to provide a comprehensive history of the profession. Backed by the Financial Planning Association, The History of Financial Planning offers a clear overview of the
