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Nota di contenuto	Title Page; Copyright; Table of Contents; Dedication; Acknowledgments; Preface; Introduction; Creating Your Financial Plan; How Does This Relate to Investing?; Are You Meeting Your Goals?; Obstacles to Reaching Financial Goals; Fuel Your Goals with Income; Developing Your Plan; Attaining Peace of Mind; Chapter #1: What Do You Want?; Put It in Writing; Six Steps to Financial Freedom; Start Planning; Other Goals; Review Your Plans with Your Family Members and Advisors; You Know What You Want; Summary; Chapter #2: What Do You Have Now?; Materials; Information You'll Need; Filing the Information Income Shifting to Save TaxesSummary; Chapter #5: A House Is Not Always a Good Investment; The True Cost of Home Ownership; A House as an Investment; Shopping for a Mortgage; Saving Money on Your Mortgage; Buying and Selling; Summary; Chapter #6: Insurance; Types of Life Insurance; My Recommendation; Types of Insurance Companies; Tax Considerations; Disability Insurance; Summary; Chapter #7: Liabilities; Good Reasons to Borrow Money; Bad Reasons to Borrow; Types of Credit; Summary; Chapter #8: Taxes; Four Methods for

Reducing Taxes; Tax Tools; Summary; Chapter #9: Investments  
Financial BasicsHow the Financial Cycle Works; Your Investment Goal;  
Evaluating Risk; Investment Triangle; Investment Strategy; Investment  
Choices; Common Investment Mistakes; Other Investments; Summary;  
Chapter #10: How to Find and Work with a Financial Planner; What Is a  
Financial Planner?; Exposing the Myths; How to Find a Financial Planner;  
Chapter #11: Financial Planning for Women; Learn About Family  
Finances While You Can; Understand Your Assets, Where They Are, and  
Who Legally Owns Them; Consolidate Accounts; Name Primary and  
Backup Beneficiaries  
Understand Pension and Social Security ArrangementsYou Need a Will, a  
Living Will, and Two Powers of Attorney; Both Spouses Need Life and  
Disability Insurance; Balancing It All; Chapter #12: Financial Planning  
for Business Owners; Business Structure; Turning a Hobby into a  
Business; Tax and Retirement Planning; Building a Team; Business  
Partners; Succession Planning; Chapter #13: Financial Planning for  
Physicians; Reasons for Bad Financial Decisions; Results of Financial  
Mistakes; Summary; Chapter #14: Learning from Professional Athletes'  
Mistakes; Holes in Their Pockets; Inexperience Hurts  
Learn from Their Mistakes

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## Sommario/riassunto

"A deeply insightful guide to goal-based financial planning and wealth management Planning a Successful Future&nbsp;empowers advisors and clients to take control of their money and manage their income to achieve their financial goals. Written by the father of fee-only financial planning, this book features real-life stories and examples from over three decades in the industry to illustrate how financial planning works and the best way to create your strategy. You'll learn how to identify and prioritize your goals, and why they're important&mdash;and how to get where you need to be for retirement, education, home ownership, and more. Practical exercises get you started on the right track, and useful checklists keep you organized and focused along the way. You'll get expert insight on risk management, allocation, tax reduction, estate planning, and more, as you develop your strategy and put it into action. The financial services industry undergoes frequent changes, and financial planning specifically is affected to a high degree. Keeping up with the latest news and distinguishing trend from legitimate methodology can itself be a fulltime job. This book gives you the background you need to create a plan, and make the smart choices that will help you grow and protect your wealth. Create a realistic and goal-based financial plan Take a more proactive approach to your finances Identify your goals and how to achieve them Allocate investments appropriately for your situation Financial planning is complex, with many variables to analyze and outside forces that can derail even the best laid plans. Planning a Successful Future gives you the information, tools, strategies, and insight you need to make the best decisions for your financial future"--

"The book will provide the background knowledge on how financial planning works and the best way to create a realistic and goals-oriented financial plan, empowering advisors and clients to take control of their money and manage their income to eventually become wealthy"

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