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Nota di contenuto	Retirement Portfolios: Theory, Construction, and Management; Contents; Preface; PART ONE: FRAMING THE PROBLEM; PART THREE: MANAGING PORTFOLIOS FOR RETIREMENT INCOME; PART FOUR: MAKING IT HAPPEN; APPENDIXES; Acknowledgments; Part One: Framing the Problem; Chapter 1: Portfolio Focus and Stage of Life; Chapter 2: The Top-Down View; Chapter 3: The Importance of Lifestyle Flooring; Chapter 4: Monetizing Mortality; Chapter 5: Flooring with Capital Markets Products; Part Two: Adapting Portfolios for Retirement Income; Chapter 6: Building Retirement Income Portfolios Chapter 7: Creating Allocations for Constructing Practical Portfolios by Age and Lifestyle Needs Part Three: Managing Portfolios for Retirement Income; Chapter 8: Rebalancing Retirement Income Portfolios; Chapter 9: Active Risk Management for Retirement Income Portfolios; Part Four: Making It Happen; Chapter 10: The Transition Phase; Chapter 11: Putting Together the Proposal; Chapter 12: Market Segmentation; Chapter 13: Products and Example Portfolios; Chapter 14: Preparing Your Client for a Retirement Income Portfolio; Chapter 15: Salvage Operations, Mistakes, and Fallacies

Appendix A: History of Theoretical Developments in Life-Cycle Planning
THE MODEL; RISING LIFESTYLES AND HABIT FORMATION; EMPIRICAL
STUDIES OF LIFE-CYCLE BEHAVIOR; Appendix B: How Professionals Can
Maximize the Usefulness of this Book; TRANSACTION-ORIENTED
SALESPEOPLE; ASSET GATHERERS; INSURANCE PLANNERS; FINANCIAL
PLANNERS; PORTFOLIO MANAGERS; Notes; Glossary; References; Index

Sommario/riassunto

Retirement portfolio guidance for finance professionals Retirement is one of the most important parts of the financial planning process. Yet only two percent of financial advisors describe themselves as competent in retirement planning. Constructing a retirement portfolio is viewed as a difficult endeavor, and the demands facing financial advisors responsible for this task continue to grow. The pressures are particularly intense due to events such as the financial crisis and oncoming rush of retiring baby boomers. It is imperative that financial advisors be equipped and ready to
