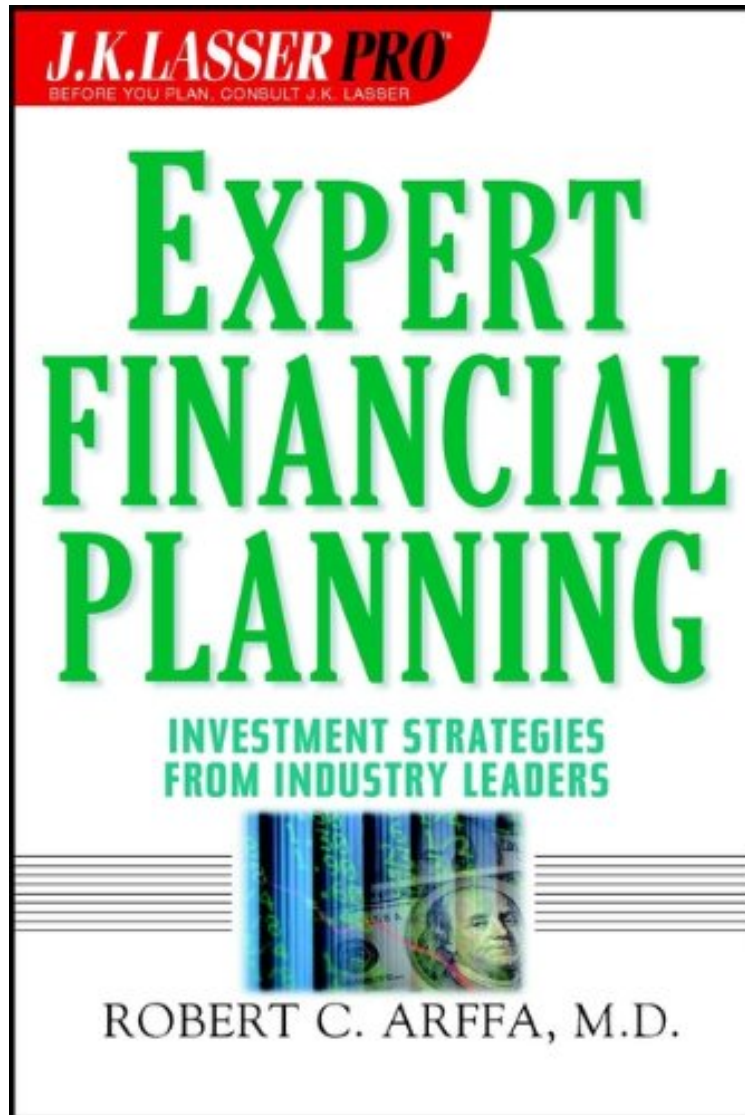


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## Expert Financial Planning: Investment Strategies from Industry Leaders (J.K. Lasser Pro.)

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who is worrying that they're not planning for the future. easy read

Praise for J.K. Lasser Pro Expert Financial Planning "A gem of a personal financial planning guide. Dr. Arffa has prepared many of the chapters himself and his highly readable and accessible overviews are presented with grace and clarity. Included also are discussions by industry professionals and leading investment thinkers. Readers seeking to enhance their financial security will be richly rewarded." -Burton Malkiel, author of A Random Walk Down Wall Street Here is top-level financial planning advice for professionals who counsel affluent clients, as well as for savvy individual investors looking to make the most of their incomes for years to come. Featuring the expertise of some of our most articulate, nationally recognized finance pros, this priceless book will take you through all the steps necessary to creating and realizing a financial plan that's right for your personal needs and goals. Learn how to: \* Set and prioritize goals \* Assess your current financial status \* Make projections for each goal \* Devise a strategy that includes spending, saving, and investing \* Review risk management \* Track your financial progress \* Evaluate the tax consequences of investment decisions \* Select life and disability insurance . . . all with the help of leaders in their fields, including John C. Bogle \* Richard Driehaus \* Peter Katt \* Weston Wellington \* Gregory D. Curtis \* Jay Mueller, CFA, and many more . . .

From the Inside Flap From marriage to parenting to retirement and the host of events in between, almost all goals and shifts in life involve finances. Although a healthy paycheck comes in quite handy, the truth is that very few people become financially secure; much less wealthy; simply by having sufficient income. Whether you're thinking about the near or far future, concrete financial planning will greatly increase your chances of realizing your financial goals. In this invaluable guide, nationally recognized experts such as John Bogle, Peter Katt, and Weston Wellington share their experience with those of you who counsel affluent clients, including attorneys, financial advisors, and fund managers, as well as with upper-income individual investors seeking reliable advice. Generally, financial goals fall into two categories: accumulation and income replacement. The objective of the former is to acquire a certain amount of money by a certain time, as in the case of college funding. The latter goal refers to generating cash flow that will begin at a certain point and continue into the future, as in the case of retirement funding. Retirement planning is particularly challenging because it lies so far into the future and requires such a large amount of savings; necessitating a trade-off between spending on today's wants and saving for tomorrow. But, in either case, understanding your own individual spending and saving habits is as important as your formal knowledge of finance. In addition to equipping you with a solid grasp of the many investment vehicles available today; stock analysis and selection strategies; the variety of funds, tax, insurance, and estate planning; and much more, this book also helps you become aware of the strong influences on your financial behavior. Buying patterns, for example, are impacted by our values and our relationships with our families and neighborhoods, as well as by our need for security, intellectual stimulation, belonging, and diversion. In order to reshape this behavior and develop a suitable financial plan, it's important to examine what motivates you to buy. How do you define financial security? How are you affected by the culture of consumerism? Are you a professional spender, or do you view spending as a hobby? Regardless of your answers, there is a financial plan that is right for you. The guidance and practical wisdom provided by J.K. Lasser Pro Expert Financial Planning will help you discover it; and implement it. From the Back Cover Praise for J.K. Lasser Pro Expert Financial Planning "A gem of a personal financial planning guide. Dr. Arffa has prepared many of the chapters himself and his highly readable and accessible overviews are presented with grace and clarity. Included also are discussions by industry professionals and leading investment thinkers. Readers seeking to enhance their financial security will be richly rewarded." -Burton Malkiel, author of A Random Walk Down Wall Street Here is top-level financial planning advice for professionals who counsel affluent clients, as well as for savvy individual investors looking to make the most of their incomes for years to come. Featuring the expertise of some of our most articulate, nationally recognized finance pros, this priceless book will take you through all the steps necessary to creating and realizing a financial plan that's right for your personal needs and goals. Learn how to: Set and prioritize goals Assess your current financial status Make projections for each goal Devise a strategy that includes spending, saving, and investing risk management Track your financial progress Evaluate the tax consequences of investment decisions Select life and disability insurance. . . all with the help of leaders in their fields, including John C. Bogle; Richard Driehaus; Peter Katt; Weston Wellington; Gregory D. Curtis; Jay Mueller, CFA, and many more . . . About the Author ROBERT C. ARFFA, M.D., is an eye surgeon with a keen interest in financial planning.