

# Sample Financial Planner Client Introduction Letter

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*Sample Financial  
Planner Client  
Introduction Letter*

2023-08-06

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### The Financial Advisor's Success Manual AMACOM

The financial planing profession is undergoing a transformation from the historical approach of transactions and straight asset accumulation to an integrated financial and life planning strategy for customers. Your Clients for Life: The Definitive Guide to Becoming a Successful Financial Life Planner is a roadmap that financial planners can use to understand how to make the connection between financial planning and life planning. Its premise is that advisors of the future will need to deal more with money as an element of a client's life that cannot be viewed alone.

*Keeping Clients for Life* Author House

A successful financial planner is someone who does more than just crunch numbers and present an annual investment plan to clients. There is a psychological component to effective client care as well as to issues involving clients' overall financial well-being. People skills, as well as financial planning skills, are necessary to build a successful financial planning business. This comprehensive guide teaches both new and veteran financial professionals how to relate to their clients in meaningful ways, thus growing their business by increasing the long-term retention of those clients. Offered here are insights into such issues as how to determine which clients to accept, how to propose a plan clients can use, how to tread carefully in family situations, how to develop sensitivity and communications skills, and how to work with the media and recognize the importance of building your business one lasting relationship at a time. Karen Caplan Altfest, PhD, CFP (New York, NY), is Vice President of L. J. Altfest & Co., a financial planning and investment management firm. She is also the Director of the Financial Planning and Investments Program at the New School.

*From the Boiler Room to the Living Room*

John Wiley & Sons

The Keys to your future success! Women are a goldmine of opportunity for any financial advisor looking to accelerate business growth. The key is knowing what women want and how to apply that knowledge to attract more female clients and generate more referrals. This book is your personal roadmap to making that shift. With the Keys to the Ladies Room you will discover how easy it can be to: Understand the difference in how men and women relate to money and convert that knowledge to create a more purpose driven business model. Develop your personal story which inspires more trust and confidence with both prospects and clients faster Share what you do in a way that leaves the listener sitting up and craving for more. Incorporate a more purpose driven process that engages both clients and prospects simultaneously, uncovering more assets and opportunities. Articulate your true value as a financial advisor (and its not what you think!)that wins you the big business With time-tested scripts and practical, step-by-step guidance from a former Smith Barney National Training Officer, this book promises to transform your marketing and accelerate business growth by attracting more women clients and creating more loyal raving fans. This book is destined to start a new revolution in the financial services industry. Adri has artfully combined the strengths of women with the experience and wisdom of men to create a new, refreshing business model for financial advisors. She speaks directly to what advisors need and what clients want. This is a must-read for any financial professional looking to create a deeply meaningful and highly profitable advisory practice. Barbara Stanny, Bestselling author of Prince Charming Isnt Coming, Overcoming Underearning, and Secrets of Six-Figure Women *Your Clients for Life* John Wiley & Sons There has never been more opportunity for financial planners--or more reasons for financial professionals to consider switching the direction of their careers into this lucrative field. Today's planners will cash in on the huge surge of baby boomers preparing for retirement in the

decades ahead. And as the number and complexity of investments rises, more individuals will look to financial advisers to help manage their money. In the new paperback edition of this guide, Jeffrey H. Rattiner, a practicing financial planner and educator, provides a complete, systematic, turnkey framework for the aspiring planner to follow. Starting from the key question, "Why do you want to be a financial planner?" the author guides you through the development of an effective infrastructure and client management system for your practice. The many essential concepts are clearly illustrated with examples from practicing professionals. Throughout this handbook, Rattiner provides personal insights on how and why a planner must develop a solid understanding of client needs before building a comprehensive financial plan. Getting Started as a Financial Planner has everything one needs to know—from how to set up a practice and communicate with clients to how to manage investments and market services—in order to launch a career in financial planning and to attain success in this high-growth profession. *The New Wealth Management* John Wiley & Sons Deena B. Katz, CFP, a preeminent authority on practice management and an internationally recognized financial adviser, presents a comprehensive guide to running a professional financial planning practice. To create this book, Katz updated, revised, and combined her two acclaimed books Deena Katz on Practice Management (1999) and Deena Katz's Tools and Templates for Your Practice (2001). In this newly expanded volume, she presents the essentials on how to help a practice thrive side by side with the tools and templates needed for the everyday operation of your firm. This new volume offers guidance on practice-management issues: setting up an office systems and technology administration and staffing marketing growing as the market changes hanging on to clients for the long term succession planning when the time comes This comprehensive resource provides sample forms, worksheets, templates, letters, brochures,

and collateral materials developed and refined by top wealth managers and planners. From keeping the business running well by designing dynamic collateral material, to considering plans for retirement, Deena B. Katz guides advisers through every challenge a financial planning business will face.

**Financial Planning** John Wiley & Sons  
Financial services pioneers Scott West and Mitch Anthony spent more than three years studying financial advisors who managed 100 percent of their clients' assets—they were interested in how these advisors had outperformed their peers. What Scott and Mitch found was amazing: the most successful advisors had mastered an innate ability to get their clients to tell them their stories. When these advisors asked clients about their stories, those clients felt interesting, important—and listened to. They shared much more than they would have by simply answering questions on a checklist. Advisors gained a deeper understanding of the individuals they were working with. The connection between advisor and client became so powerful that it was next to impossible for any competitor to come between them. The new edition of this perennial favorite includes tools and ideas for starting client conversations, and shows you how to: Use dialogues to learn more about your clients Integrate client's unique circumstances, goals, and transitions into their winning financial plan Your Client's Story demonstrates how to ignite the flames of your curiosity, ignite empathy in your client relationships, and bring a sense of life and excitement to your business as you've never experienced before.

*Essentials of Personal Financial Planning*  
John Wiley & Sons

Exploring the Human Element of Financial Planning Communication Essentials for Financial Planners tackles the counseling side of practice to help financial planners build more productive client relationships. CFP Board's third book and first in the Financial Planning Series, Communication Essentials will help you learn how to relate to clients on a more fundamental level, and go beyond "hearing" their words to really listen and ultimately respond to what they're saying. Expert coverage of body language, active listening, linguistic signals, and more, all based upon academic theory. There is also an accompanied set of videos that showcase both good and bad communication and counseling within a financial planning context. By merging written and experiential learning supplemented by practice assignments, this book provides

an ideal resource for any client-facing financial professional as well as any student on their pathway to CFP® certification. Counseling is a central part of a financial planner's practice, and attention to interpersonal communication goes a long way toward progressing in the field; this guide provides practical instruction on the proven techniques that make a good financial planner great. Build client relationships based on honesty and trust Learn to read body language and the words not spoken Master the art of active listening to help your clients feel heard Tailor your communications to suit the individual client's needs The modern financial planning practice is more than just mathematics and statistical analysis—at its heart, it is based on trust, communication, and commitment. While interpersonal skills have always been a critical ingredient for success, only recently has this aspect been given the weight it deserves with its incorporation into the certification process.

Communication Essentials for Financial Planners provides gold-standard guidance for certification and beyond.

Deena Katz's Complete Guide to Practice Management Insights Press

Do you want to become a million-dollar financial advisor, boost client satisfaction, and dramatically expand your business? This book provides all the answers and strategies you need to do just that. Complete with proven techniques, expert insights, and practical tips to maximize your profitability, The Financial Advisor's Success Manual will show you how to break the cycle of moderate growth by teaching you how to: Develop a differentiation strategy Define and implement your six core client-facing processes Balance the cost of services with the value delivered Enhance client loyalty Perfect your personal marketing and sales approach You didn't start your financial services firm with a goal of modest gains. So don't settle for that! By implementing the methodologies and strategies in this manual, you can grow your business beyond your wildest expectations—all while serving your clients better.

**J.K. Lasser Pro Separate Account Management** John Wiley & Sons

In his second book, Eric Brotman aims to arm you with the tools you need to achieve an independent and dignified retirement. Specifically, "Retire Wealthy" is designed... 1) To provide a financial literacy tool for you to learn the basics. 2) To motivate you to get on the path to financial independence and to have the tools you need to help make the journey a

rewarding one. 3) To provide a process and various strategies you can use in doing financial planning and wealth-building on your own or with your financial advisor. (Would also like to see 1-2 testimonials on the back cover)

**Practice Made (More) Perfect** John Wiley & Sons

An accessible guide that contains the tools needed to find trustworthy financial assistance Given the events of the past two years—from bankruptcies to financial scams—it is more important than ever that investors understand who they are hiring to handle their finances. Getting Started in Finding a Financial Advisor explores the important relationship between an investor and their financial advisor and examines how you should go about finding potential candidates. Along the way, it shows you how to interview and check the credentials of six key types of advisor so that you can spot and avoid rogues, scam artists, and incompetents. You will also learn how to understand what can happen if the institution or the advisor ends up in financial or legal difficulty. This insightful and useful guide Helps you determine the kind of advisor best-suited for your situation Provides interview questions, discusses what credentials really mean, and which are important Explains in detail the issue of fiduciary responsibility of financial advisors, so you can find helpers who are on your side Most people who give advice about money are trusted without actually earning that trust. Getting Started in Finding a Financial Advisor helps you set the highest standards, allowing you to locate professionals who can be trusted to protect your financial well-being and help you prosper.

**Retire Wealthy** John Wiley & Sons

Reframe "wealth management" to achieve sustainable success in financial services You've Been Framed™ is a step-by-step guide for achieving ultimate profitability and sustainability for your financial advisory firm. Whether you're a savvy entrepreneur ready to dominate your competitors, or a more experienced advisor moving toward selling your practice, this guide will help you proactively reframe your business. You'll learn how to grow your pipeline of prospects, win the next generation of clients, and deepen your business so it can thrive without you—leaving you free to pursue what matters to you. Build your business on a holistic foundation of wealth management and assemble the team that will take you to the top as you develop a whole new perspective from which to offer your services. Transform your role from "directive advisor" to "trusted advocate."

Completely shift the paradigm, and make yourself the de facto solution to your clients' wealth management issues. Whether it's the firm with which you're affiliated or the types of products and services you offer, you've been "framed." As a wealth management advisor, your clients have little understanding of what you do or why you do it. Even your team may have the wrong idea. This book helps you clarify and demonstrate the value of your knowledge and skills, so you can frame your work on your own terms. Build and showcase your enterprise value Renew client relationships and attract new demographics Become a leader with proven team-building tools Shift your role from advisor to advocate If you haven't effectively led discussions to co-create what your business stands for—and what differentiates it from competitors—you're losing talent, prospects, and business. You've Been Framed™ gives you the perspective you need to thrive in the new financial environment, and achieve sustainable success.

Planning a Successful Future John Wiley & Sons

The #1 way to start getting referrals? STOP ASKING In all his years of helping financial professionals build and grow their businesses, Stephen Wershing has learned that the number one way to make sure you don't get a referral is by asking for it. Why? Because studies prove that clients refer you not to benefit you but to benefit themselves. So you have to approach the challenge from a completely new angle. Stop Asking for Referrals helps you do exactly that. Inside, Wershing provides the tools you need to get more referrals than ever by designing your practice in a way that gets clients to mention you to friends when the opportunity arises. He calls it "the new referral conversation," and it works. Define your target market with accuracy and precision Communicate your value clearly and effectively Create your company's unique "brand" Harness the natural, normal social interactions of your clients to serve your marketing efforts You'll also learn how to use client feedback to benefit your business, create your service package, and bring in new business. "The way you have been told to attract referrals is based on an assumption that's wrong," Wershing writes. "And it is undermining your business and your relationships." You will come away with a deep understanding of why and where referrals actually come from, how to tailor your own practice to get people talking about you, and ways to develop a communication plan to project your reputation. So stop asking for referrals--

and start attracting more new clients than you ever thought possible. Praise for Stop Asking for Referrals "Steve Wershing helps you unlock the untapped referral potential you have in your business today with an approach that is as comfortable as it is effective." -- JULIE LITTLECHILD, founder and president of Advisor Impact "The most comprehensive, practical, and engaging guide I know of for strengthening existing client connections and cultivating new ones in a way that is experience-based, respectful, and long-lasting." -- OLIVIA MELLAN, psychotherapist, money coach, author of The Client Connection, and columnist for Investment Advisor "Reading this book will revolutionize how you think about growing your business." -- MICHAEL E. KITCES, MSFS, MTAX, CFP, partner, Pinnacle Advisory Group, and blogger, Nerd's Eye View "This book will help you overcome . . . discomfort and show you how to engage your clients so that they will proudly help you build your business. Kudos for this powerful, one-stop marketing resource!" -- SHERYL GARRETT, CFP, AIF, award-winning author, advisor, and founder of the Garrett Planning Network "Stop Asking for Referrals is on my Top Ten list of books that I believe offer the most meaningful strategies for advisors. . . . Steve's ideas for referral marketing are brilliant and just plain common sense. Advisors will embrace his book as the new referral bible." -- SYDNEY LEBLANC, founding editor of Registered Rep magazine; partner of LeBlanc and Company "Embrace Steve's advice if you'd like to see your practice growth become effortless, boundless, and fun!" -- MARIE SWIFT, CEO, Impact Communications, columnist for Financial Planning magazine, and author of Become a Media Magnet **Client Psychology** Advisorpress J.K. Lasser Pro(TM) Before You Plan, Consult J.K.Lasser Innovative Planning That Benefits Professionals and Clients What does it take to be a successful fee-only financial planner? According to John Sestina, acclaimed "father of fee-only financial planning," the only special qualifications are a genuine desire to help people, an ability to listen, and a commitment to lifelong learning. Fee-Only Financial Planning introduces financial planners to the newest, fastest-growing niche in the financial planning field-fee for service rather than commission-based planning. Fee-only planning is attractive to the growing number of clients who want to avoid the long-term payments, lack of objectivity, limited choices, or conflict of interest that can occur with a commission-based payment structure. In his comprehensive how-to guide and easy-to-

use reference, John Sestina provides in-depth coverage of the financial planning field. He covers such topics as: \* The advantages and disadvantages of fee-only planning for both client and planner \* Making the transition from commission-based to fee-based planning \* Building a profitable practice with varied client bases \* Tailoring to your own work style the system Sestina developed over 35 years of successful private practice \* Developing and maintaining productive client relationships For professionals wondering whether fee-only financial planning is in their future, or for anyone in financial services who wants to stay current, Fee-Only Financial Planning is an eye-opening introduction to one of the financial world's freshest, richest entrepreneurial careers. *The Keys to the Ladies' Room* John Wiley & Sons

90% of financial advisors fail at being financial advisors. Why? Because advisors, brokers, reps, and agents need to see more people to make more sales appointments. And nobody in their firm, agency, branch, or shop trains them how! Knockout Networking for Financial Advisors is the only book written for sales producers in the financial services industry focused on making more connections through networking In the wake of the COVID 19 pandemic, networking, developing relationships, generating referrals, and making important connections are as important as ever. The ideas and approaches in Knock Out Networking for Financial Advisors can be applied immediately to virtual meetings, online networking groups, social media, podcasts, and of course, phone calls. The problem is, most advisors and sales producers are not born networkers; they develop the skills and confidence through education, training, practice, and having a positive attitude. Knockout Networking for Financial Advisors covers everything you need to know about going to the right places (virtual or not!), saying the right things, and meeting the right people—essential skills for a financial advisor or sales producer that's serious about making more and better connections! The result? More prospects, more referrals, and more business. Author Michael Goldberg is a networking specialist, speaker, trainer, author (and boxer!) focused on helping financial advisors, brokers, agents, reps, wholesalers, and other sales producers grow their business or practice through networking. In this must read if you're a financial advisor book, you will learn how to: Confidently meet and greet new people in business settings Further define your

Target Market to establish more and better connections Deliver a knockout elevator speech (not a script!) Generate more prospects and referrals from current client base Establish important relationships generating more business opportunities Bottom line, networking is the most effective way to attract more prospects, more referrals, and more business to your corner. Remember—keep the left up!

### **Rattiner's Secrets of Financial Planning**

McGraw Hill Professional  
ESSENTIALS OF PERSONAL FINANCIAL PLANNING Essentials of Personal Financial Planning was written to challenge the status quo by promoting personal financial planning (PFP) as a profession, not as a sales tool to gather assets under management or facilitate sales of insurance products. The book takes a comprehensive and integrated approach to PFP for accounting students, allowing them to view the profession through the lens of a CPA - with integrity and objectivity. This book systematically introduces the essentials of all the major PFP topics (estate, retirement, investments, insurance, and tax), as well as: The PFP process, concepts and regulatory environment. Professional responsibilities of a CPA personal financial planner and the requirements of the Statement on Standards in PFP Services. Time value of money concepts. The book then builds on these foundational concepts, showing their interconnectivity and professional opportunities, to provide a deeper understanding of PFP and its application. After reading this book, students will be able to apply the knowledge and skills gained from this course to have an immediate and long-term positive impact for themselves and for the clients they serve.

### The Client-centred Financial Adviser

Outskirts Press

A Client-Centered approach to Financial Planning Practice built by Research for Practitioners The second in the CFP Board Center for Financial Planning Series, Client Psychology explores the biases, behaviors, and perceptions that impact client decision-making and overall financial well-being. This book, written for practitioners, researchers, and educators, outlines the theory behind many of these areas while also explicitly stating how these related areas directly impact financial planning practice. Additionally, some chapters build an argument based solely upon theory while others will have exclusively practical applications. Defines an entirely new area of focus within financial planning practice and research: Client Psychology Serves as

the essential reference for financial planners on client psychology Builds upon and expands the body of knowledge for financial planning Provides insight regarding the factors that impact client financial decision-making from a multidisciplinary approach If you're a CFP® professional, researcher, financial advisor, or student pursuing a career in financial planning or financial services, this book deserves a prominent spot on your professional bookshelf.

### **Success as a Financial Advisor For Dummies**

Amacom

Implementing a financial plan to manage the future is very important. If you have not assembled such a plan, or even if you have not thought about how best to manage your financial future, the time to do so is now, and the resource you need to walk you through every step of the personal financial planning process is Plan Your Financial Future. Regardless of whether you are a recent college graduate or have spent the past several decades in the working world, Plan Your Financial Future will give you the smart, commonsense advice you need to get your financial life in order. Written by an expert and long-standing educator in the field of personal financial planning, Plan Your Financial Future is a comprehensive, objective, and pertinent guidebook for readers of all income levels who want to grow their net worth on a steady and increasing basis. Covering all the financial bases you can reasonably expect to confront in your lifetime, like insurance, investing, income tax planning, Social Security, Medicare, and more, this vital resource begins with techniques to protect a consumer's personal and business assets. It then transitions into the wealth accumulation process and outlines tax management measures, as well as the distribution of wealth for higher education, retirement, and estate planning purposes. Filled with in-depth insight and invaluable financial planning advice, this unique guide explains how to: Insure yourself, your family, and your property against the possibility of significant loss; Invest in financial or real assets—or both; Practice effective tax planning and management techniques; Distribute your estate at death to your intended beneficiaries in a tax-efficient manner; And much more. With its no-nonsense, straightforward style and holistic view of the financial planning process, Plan Your Financial Future is the one resource you need to become a more knowledgeable saver and translate those savings into the accumulation of future wealth. What you'll learn Readers of Plan Your Financial Future will learn: How to

take advantage of benefits that are offered to them by their employer The importance of minimizing the effects of inflation on their portfolios as much as possible Financial strategies for preparing for their children's higher education Rock-solid advice for planning for the financial aspects of their retirement years Whether or not they would benefit from the hiring of a professional financial planner How to create and maintain a personal financial plan that protects them and their families into the future Who this book is for Plan Your Financial Future is designed for readers of all income levels who would like grow their net worth on a steady and increasing basis by implementing and sticking to a personal financial plan. Everyone from recent college graduates to those who have been in the working world for many years will benefit from the insightful, actionable advice offered up in Plan Your Financial Future. Table of Contents Understanding the Challenge/The Need to Begin Do You Need a Financial Planner? Elements of Personal Financial Planning and the Wealth Management Process Insuring Yourself and Your Family Insuring Your Health and Long Term Care Insuring Your Earning Power Insuring Your Property Optimizing Your Employment Benefits Investing in Financial Assets Investing in Real Assets Employing Assets Profitably Income Tax Planning and Management Transfer Tax Planning and Management Life Events that Endanger Wealth Planning for Your Child's Higher Education Planning for the Financial Aspects of Retirement Planning for the Lifestyle Needs of Retirement Planning for Other Lifetime Goals Estate Planning Philanthropy Reaping the Rewards Sample Data Gathering Form Sample Budget Durable General and Financial Power of Attorney (POA) Declaration as to Medical or Surgical Treatment and Medical Durable POA Sample Personal Letter of Instructions Glossary

### Becoming a Life Advisor Apress

"Jeff Rattiner has found another way to help producers. This book is a must-have for financial advisors, especially those that aspire to be Million Dollar Producers." - Thomas B. Gau, CPA, CFP President and CEO of Million Dollar Producer "Jeff Rattiner has done it again! His book displays all the essential tools and techniques necessary for advanced planners to succeed in this business. Rattiner's easy-to-read style provides the best in marketing and practice management ideas. This book will help you if you have hit a dead end in your practice. Rattiner tells it like it is by providing a no-nonsense approach to truly

taking your practice to the next level. A must-read for the serious financial advisor." -Jim Cannon, President, SunAmerica Securities, Sentra Securities Corporation, and Spelman & Co., Inc. Financial planners provide a variety of services to an array of clients but lack a uniform system for creating a profitable business. Rattiner's Financial Planner's Bible: The Advisor's Advisor collects best practices from the nation's leading financial planners, presenting a prototype turnkey model for achieving financial success for both the client and the practice. Financial planning expert Jeffrey Rattiner emphasizes an ethical, practical approach to financial advising, placing paramount importance on "doing what's best for the client." Drawing on extensive interviews and his own experience, Rattiner delivers can't-miss tips on marketing a financial planning practice, developing an infrastructure, crafting strategic alliances, assessing a business's profitability, and creating the model twenty-first-century practice. This authoritative guide also covers: \* Forming a planning advisory board \* Establishing a realistic chain of command \* Delegating responsibility \* Making technology work for you \* Charging clients appropriately

Running a financial planning business need not be an exercise in trial and error. Rattiner's Financial Planner's Bible delivers a compelling model for advising success.

**The Financial Planner's Guide to Client Consideration** John Wiley & Sons Mainstay reference guide for wealth management, newly updated for today's investment landscape For over a decade, The New Wealth Management: The Financial Advisor's Guide to Managing and

Investing Client Assets has provided financial planners with detailed, step-by-step guidance on developing an optimal asset allocation policy for their clients. And, it did so without resorting to simplistic model portfolios, such as lifecycle models or black box solutions. Today, while The New Wealth Management still provides a thorough background on investment theories, and includes many ready to use client presentations and questionnaires, the guide is newly updated to meet twenty-first century investment challenges. The book Includes expert updates from Chartered Financial Analyst (CFA) Institute, in addition to the core text of 1997's first edition - endorsed by investment luminaries Charles Schwab and John Bogle Presents an approach that places achieving client objectives ahead of investment vehicles Applicable for self-study or classroom use Now, as in 1997, The New Wealth Management effectively blends investment theory and real world applications. And in today's new investment landscaped, this update to the classic reference is more important than ever.

**Stop Asking for Referrals: A Revolutionary New Strategy for Building a Financial Service Business that Sells Itself** John Wiley & Sons Learn what it takes to be a success from the 'all-stars' of the financial planning and advisory profession Financial planning involves everything from determining the client's financial position, cash flow, and investment strategies, to income tax planning, risk management, insurance, and retirement and estate planning. Financial planners and advisors are responsible for recommendations and

decisions that help people define and achieve their financial goals. Rattiner's Secrets of Financial Planning gives industry professionals the opportunity to hear and learn from 'the best of the best' in the field. Author Jeffrey H. Rattiner, a respected leader in Certified Financial Planning (CFP), shares real-world insights and expert advice from hundreds of top-level advisors in the financial planning industry. Readers gain firsthand knowledge of the challenges these successful planners have faced and how they continue to build their practices and reap success in a dynamic financial environment. This comprehensive resource includes templates based on what the best CFPs use in their practices for work programs, data quantification reports, asset allocation model portfolios, pro forma statements, and checklists for each technical financial planning discipline. Designed specifically for industry professionals, this in-depth book: Offers CFPs and financial advisors proven advice and practical methods to take their practice to the next level Includes contributions from and interviews with the leading advisors in the profession Provides templates taken from the practices of high-level financial advisors Explains the key ingredients for building a superior financial planning practice Helps develop successful financial planners and strengthen profitable practices Rattiner's Secrets of Financial Planning: From Running Your Practice to Optimizing Your Client's Experience is an important resource for CFPs, CPAs, financial advisors, financial planners, and high-level corporate executives working in the financial services industry.