



The Wealth Management Index: The Financial Advisor's System for Assessing & Managing Your Client's Plans & Goals

Ross Levin

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Because wealth management encompasses a variety of disciplines--the management of personal risks, prudent investing, reduction of income taxes, and ensuring appropriate estate distribution--traditional performance measures are misleading and ineffective. In this landmark book, Ross Levin presents the Wealth Management Index T M, an innovative tool for financial advisors to quantify their clients' success in financial planning. The index helps financial advisors establish rational goals with their clients and measure their progress toward achieving goals. Wealth Management Index includes: Guidelines and strategies for determining your clients' unique needs; A detailed discussion of each section of the index--asset protection, disability and income protection, debt management, investment and cash flow planning, and estate distribution; Step-by-step procedures on how to implement The Wealth Management Index TuM in a financial planning practice.

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