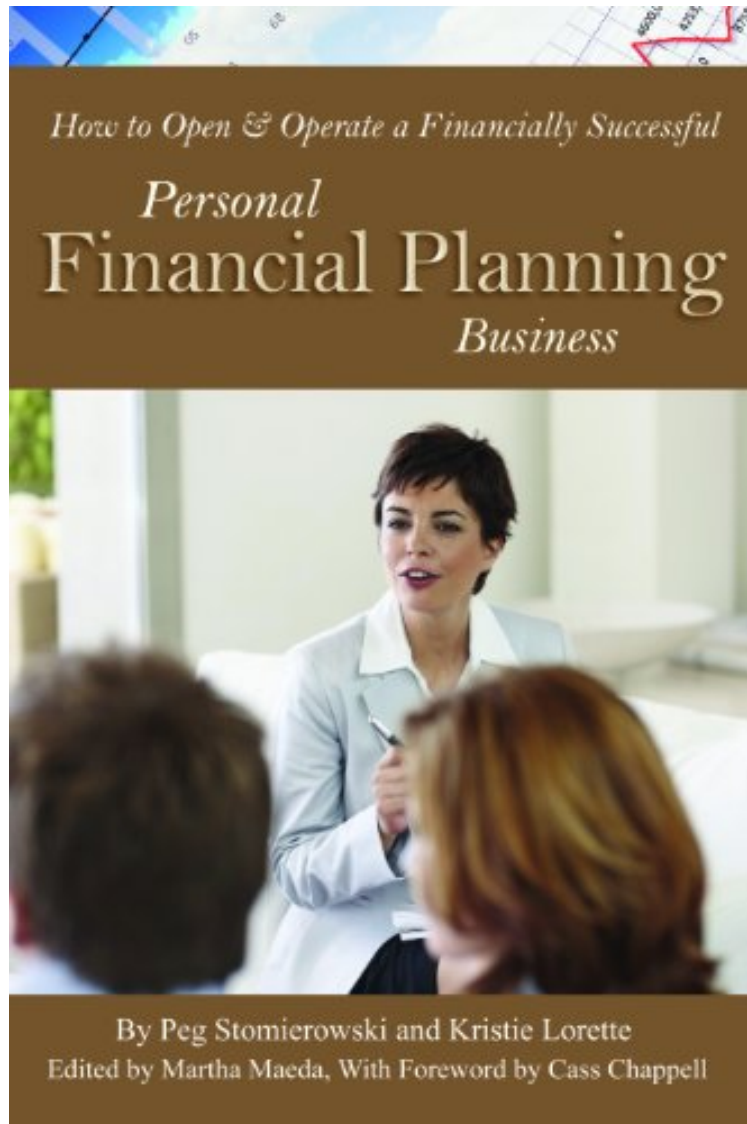


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How to Open Operate a Financially Successful Personal Financial Planning Business (How to Open and Operate a Financially Successful...)

Martha Maeda

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10 of 10 people found the following review helpful. Caveat emptor . . .By H. BenderI do not often take the time to pan a disappointing book, but in this case, I will make an exception. Before purchasing this book please consider that it was not written by an experienced financial planning entrepreneur (as I simply assumed that it was). As mentioned above, one writer is a "career writer, editor and columnist", and the other is a "copywriter and marketing consultant". Page after page I kept wondering, 'when are they going to get to the hardened and insightful content?' I then turned to the author information in the back of the book and was disappointed to find that neither of the authors had any experience in financial planning to speak of (if they do, they neglected to state it in their bios, and it certainly does not shine through in this book. Why someone would write a book entitled "How to open and operate a financially successful personal financial planning business" without any experience is puzzling if not irresponsible and misleading. This book should be removed from the shelves. It rubs me as a project for a couple of writers trying to turn a dime. Buyer beware. Yours truly, An Unemployed CFA.2 of 2 people found the following review helpful. Excellent how-to textbook for students of all ages in tough timesBy Robert T MaslynI must admit I am not a financial whiz, yet in these tough economic times, it's just smart to get smarter about financial planning. This textbook is just what the doctor ordered, with practical, how-to information loaded with case studies of real people, useful resources and step by step plain English explanations to demystify it all. And it comes with a CD chock full of financial planning forms and an editable business plan.The book presumes you want to start a financial planning business and so it enables you to cover all the bases that you need to address to have a shot at success. But I found that while I may suggest that my nieces or nephews in their 20s and 30s may want to consider doing that as a career path or that my older colleagues who are retiring and looking to begin a second act may want to dip into this book, I found the book useful even if one isn't planning on starting a business, just for it's useful tips, written sort of in Dummy book style with straightforward clear language.This has all the current info such as on the top places to launch a small business, given how things have changed since 2008, how to promote what you do through social media and a branded website and how to properly finance it all.Lots to find valuable here in these challenging times.0 of 0 people found the following review helpful. Good read and necessary for start up if you want to be financial advisorBy A CustomerDavisI read this book and satisfied with the content. Practical and useful information for beginner , highly recommend .

Millions of Americans every year have troubles with their finances. They turn to experts in droves, asking for help in filing their taxes, consolidating their debt, or just planning how they will pay their bills and invest their retirement funds. This book was written for anyone who has ever wanted to dip his or her foot into financial planning but did not know where to start. You will learn the fundamental basics of financial planning, starting with the very process that most planners use to organize their own finances. You will learn how to organize financial statements and to create plans and how to properly manage taxes to great effect. You will learn how to manage basic assets such as cash, savings, home equity, and auto- mobiles. You will learn how to effectively manage credit and how to deal with insurance including life insurance, health insurance, and property insurance.Whether you will be operating out of your home or you are looking to buy or rent office space, this book can help you with a wealth of startup information, from how to form and name your business to deciding if this will be a joint venture or if you would rather work solo. You will learn how to build your business by using low- and no-cost ways to satisfy customers, and also ways to increase sales, have customers refer others to you, and thousands of excellent tips and useful guidelines.This complete manual will arm you with everything you need, including sample business forms; contracts; worksheets and checklists for planning, opening, and running day-to-day operations; lists; plans and layouts; and dozens of other valuable, timesaving tools of the trade that no business owner should be without. For all prospective financial planners, this guide will give you a complete walkthrough and timeline of what you need to accomplish to be effective.The companion CD-ROM is not available for download with this electronic version of the book but it may be obtained separately by contacting Atlantic Publishing Group at sales@atlantic-pub.com.Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president's garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed. This Atlantic Publishing eBook was professionally written, edited, fact checked, proofed and designed. The print version of this book is 288 pages and you receive exactly the same content. Over the years our books have won dozens of book awards for content, cover design and interior design including the prestigious Benjamin Franklin award for excellence in publishing. We are proud of the high quality of our books and hope you will enjoy this eBook version.

Stomierowski (writer, editor and columnist) and Lorette (copywriter and marketing consultant) offer a guide to operating a personal financial planning business covering both practical concerns such as financing and insuring one's business, and more personal matters such as evaluating one's strengths to find the best niche. A personality quiz is

included, to evaluate aspects like whether one is better off starting a new business, entering into a partnership, or going into franchise ownership. The companion CD-ROM contains all the forms found in the book as well as an editable sample business plan. --Annotation copy;2012 Book News Inc. Portland, OR