

---

# The Excellent Investment Advisor

---

Discovering Value and Creating Growth in a  
Disrupted World  
Companies That Choose to Be Great Instead of  
Big, 10th-Anniversary Edition  
Financial Advisor's Guide to Excellence  
The Enduring Advisory Firm  
The Excellent Investment Advisor  
The real secrets to becoming financially  
independent  
Regain Liberation and Order in Your Personal and  
Professional Life  
Gathering Assets  
Comprehensive Financial Planning Strategies for  
Doctors and Advisors  
How Top Producers Sell  
How to Serve Your Clients More Effectively and  
Operate More Efficiently  
The Art of Creating an Inspiring Financial Strategy  
Ask a Manager  
How to Value, Buy, or Sell a Financial Advisory  
Practice  
Become Your Own Financial Advisor  
Serious Money  
The Art of Marketing Mutual Funds  
The New Financial Advisor  
How the Next Crisis Will Affect Your Financial  
Independence

A Manual on Mergers, Acquisitions, and Transition Planning  
Rise Above the Maze of Retirement Planning and Personal Finances  
Become the Indispensable Financial Advisor to Affluent Families  
Finance experts reveal how they save, spend, and invest  
Storyselling for Financial Advisors  
Small Giants  
Your Guide to a New Career Ninth Edition  
Understanding Investing with Plain Talk and Common Sense  
Communication Essentials for Financial Planners  
Powerful Lessons and Proven Strategies from Top Producers  
Crossing the Invisible Bridge to Exceptional Client Service and Consistent Growth  
The White Coat Investor  
The Bogleheads' Guide to Investing  
The Financial Advisor M&A Guidebook  
Prudent Practices for Investment Stewards  
Learn to Manage Your Money & Protect Your Financial Future  
The 10 Essential Truths You Need to Know About Your Money  
Defining a Global Fiduciary Standard of Excellence for Investment Stewards  
The Best of Nick Murray

## N

Barrons  
Educational  
Series  
Incorporated  
The Excellent  
Investment  
Advisor  
Nick  
Murray  
Company  
Incorporated  
S  
erious  
Money  
The Art  
of Marketing  
Mutual  
Funds  
Robert a  
Stanger &  
Company  
Fina  
ncial Advisor's  
Guide to  
Excellence  
Bec  
oming a  
World-class  
Par  
titioner  
Th  
omson  
Carswell  
What  
Your Financial  
Advisor Isn't  
Telling You  
The  
10 Essential

Truths  
LIVINGSTON  
Overwhelming.  
Need to Know  
About Your  
Money  
HMH  
**Discovering  
Value and  
Creating  
Growth in a  
Disrupted  
World**  
Nick  
Murray  
Company  
Let Plain Talk  
and Common  
Sense teach  
you how never  
to leave your  
financial  
future to  
chance. You  
know that you  
need to invest  
your money in  
order to make  
your financial  
dreams really  
happen. But  
truly  
understanding  
the world of  
investing can  
be

You may seek  
out an  
investment  
professional,  
only to find  
that you don't  
understand  
the  
investments  
they select for  
you. And so,  
instead of  
your own  
decision-  
making power,  
you rely on  
the hope that  
everything will  
just work out.  
But there is  
help! Michael  
Schaffer offers  
this handy  
pocket guide  
to  
understanding  
investments,  
as well as  
understanding  
your own  
relationship

with money. Through its sage wisdom and practical tools, you need no longer fear the investing world! Whether you are new to investing or you have been investing for many years, *Understanding Investing with Plain Talk and Common Sense* gets to the essence of what really matters. It takes you past all the media noise, the groupthink, and the emotional roller coaster that can leave you confused

and vulnerable to making major mistakes that can ruin your portfolio. **Companies That Choose to Be Great Instead of Big, 10th-Anniversary Edition** Dog Ear Publishing A guide for financial advisors who are ready to embrace new opportunities *The Enduring Advisory Firm* is a book for the forward-thinking financial advisor. Financial advisement is traditionally a hands-on field, so few in the

industry feel threatened by the shifting social and technological landscape. In this book, Mark Tibergien—routinely named one of the most influential people in the financial services world—and Kim Dellarocca make a compelling case for taking a closer look at technology and other big-deal industry trends in order to move the business of financial advice into the next stage

of its evolution. Combining a facts-based approach with case studies and examples from the field, The Enduring Advisory Firm will ignite your imagination by demonstrating practical strategies for attracting clients and streamlining operations. Today's smart practice managers are focusing on emerging topics like the needs and expectations of the Millennial generation, mobile and interactive technologies, and growth planning. Responding thoughtfully to these trends, with the help of this book, could propel your financial advising business toward a more successful future. In-depth discussion of trends and forces that you can harness to reshape your financial advisement business Case studies and examples showing how to navigate the most difficult business decisions Innovative ideas for process improvement, more fruitful client interactions, and sustainable growth Tips and insight for attracting Millennial clients and talent by leveraging new technologies The Enduring Advisory Firm will inspire financial advisors, managers, and executives to branch out in ways that will lead to measurable

growth. With a newfound focus on the evolution of your business, you might be surprised at where change takes you. In addition to providing RIAs with guidelines to help them succeed, all of the proceeds from this book will support the CFP Board Center for Financial Planning, a national initiative to create a more diverse and financial planning profession so that every American has access to

competent and ethical financial planning advice. The Center brings together CFP® professionals, firms, educators, researchers and experts to address profession-wide challenges in the areas of diversity and workforce development, and to build an academic home that offers opportunities for conducting and publishing new research that adds to the financial planning body

of knowledge. Learn more at [www.CenterforFinancialPlanning.org](http://www.CenterforFinancialPlanning.org). [Financial Advisor's Guide to Excellence](#) John Wiley & Sons  
The proven, effective strategy for reinventing your business in the age of ever-present disruption  
Disruption by digital technologies?  
That's not a new story. But what is new is the "wise pivot," a replicable strategy for harnessing disruption to survive, grow,

and be relevant to the future. It's a strategy for perpetual reinvention across the old, now, and new elements of any business. Rapid recent advances in technology are forcing leaders in every business to rethink long-held beliefs about how to adapt to emerging technologies and new markets. What has become abundantly clear: in the digital age, conventional wisdom about business

transformation no longer works, if it ever did. Based on Accenture's own experience of reinventing itself in the face of disruption, the company's real world client work, and a rigorous two-year study of thousands of businesses across 30 industries, Pivot to the Future reveals methodical and bold moves for finding and releasing new sources of trapped value-unlocked by

bridging the gap between what is technologically possible and how technologies are being used. The freed value enables companies to simultaneously reinvent their legacy, and current and new businesses. Pivot to the Future is for leaders who seek to turn the existential threats of today and tomorrow into sustainable growth, with the courage to understand that a wise pivot strategy

is not a one-time event, but a commitment to a future of perpetual reinvention, where one pivot is followed by the next and the next.

*The Enduring Advisory Firm*  
John Wiley & Sons

How maverick companies have passed up the growth treadmill — and focused on greatness instead. It's an axiom of business that great companies grow their revenues and profits year after year. Yet

quietly, under the radar, a small number of companies have rejected the pressure of endless growth to focus on more satisfying business goals. Goals like being great at what they do, creating a great place to work, providing great customer service, making great contributions to their communities, and finding great ways to lead their lives. In *Small Giants*, veteran

journalist Bo Burlingham takes us deep inside fourteen remarkable companies that have chosen to march to their own drummer. They include Anchor Brewing, the original microbrewer; CitiStorage Inc., the premier independent records-storage business; Clif Bar & Co., maker of organic energy bars and other nutrition foods; Righteous Babe Records,



the record company founded by singer-songwriter Ani DiFranco; Union Square Hospitality Group, the company of restaurateur Danny Meyer; and Zingerman's Community of Businesses, including the world-famous Zingerman's Deli of Ann Arbor. Burlingham shows how the leaders of these small giants recognized the full range of choices they had about the type of company

they could create. And he shows how we can all benefit by questioning the usual definitions of business success. In his new afterward, Burlingham reflects on the similarities and learning lessons from the small giants he covers in the book.

**The  
Excellent  
Investment  
Advisor**

White Coat Investor LLC  
the  
From the creator of the popular website Ask a Manager and

New York's work-advice columnist comes a witty, practical guide to 200 difficult professional conversations —featuring all-new advice! There's a reason Alison Green has been called "the Dear Abby of the work world." Ten years as a workplace-advice columnist have taught her that people avoid awkward conversations in the office because they simply don't know what to say. Thankfully,

Green does—and in this incredibly helpful book, she tackles the tough discussions you may need to have during your career. You'll learn what to say when • coworkers push their work on you—then take credit for it • you accidentally trash-talk someone in an email then hit “reply all” • you're being micromanaged—or not being managed at all • you catch a colleague in a lie • your

boss seems unhappy with your work • your cubemate's loud speakerphone is making you homicidal • you got drunk at the holiday party Praise for Ask a Manager “A must-read for anyone who works . . . [Alison Green's] advice boils down to the idea that you should be professional (even when others are not) and that communicating in a straightforward manner with candor and

kindness will get you far, no matter where you work.”—Booklist (starred review) “The author's friendly, warm, no-nonsense writing is a pleasure to read, and her advice can be widely applied to relationships in all areas of readers' lives. Ideal for anyone new to the job market or new to management, or anyone hoping to improve their work experience.”—Library Journal (starred

review) "I am a huge fan of Alison Green's Ask a Manager column. This book is even better. It teaches us how to deal with many of the most vexing big and little problems in our workplaces—and to do so with grace, confidence, and a sense of humor."—Robert Sutton, Stanford professor and author of *The No Asshole Rule* and *The Asshole Survival Guide* "Ask a Manager is the ultimate playbook for

navigating the traditional workforce in a diplomatic but firm way."—Erin Lowry, author of *Broke Millennial: Stop Scraping By and Get Your Financial Life Together* **The real secrets to becoming financially independent** Advisorpress Learn what makes a client trust you to be their financial advisor. Put the power of story telling into selling financial products. The authors explain the process of

making these intuitive connections, then translate their findings into understandable and practical strategies that any financial professional can use. They present actual stories, including many by Warren Buffet, one of the greatest "storytellers" of all time. These actual stories can help financial pros tap into the "gut reaction" of different types of clients. the book also includes

special topics on communicating to women, the 50+ market, and the affluent.

**Regain Liberation and Order in Your Personal and Professional Life** Nick

Murray Company Incorporated  
How you are perceived by clients is key for a professional advisor. Readers who take on board what The Advisor Playbook outlines will come away with an understanding

of how they are perceived, of how to cast themselves as a consultant with a process rather than a salesperson with a quota, and will set a constantly rising bar for their own success.

**Gathering Assets**

AMACOM  
The world of investing normally sees experts telling us the 'right' way to manage our money. How often do these experts pull back the curtain and tell us how they invest their own

money? Never. How I Invest My Money changes that. In this unprecedented collection, 25 financial experts share how they navigate markets with their own capital. In this honest rendering of how they invest, save, spend, give, and borrow, this group of portfolio managers, financial advisors, venture capitalists and other experts detail the 'how' and the 'why' of their

investments. They share stories about their childhood, their families, the struggles they face and the aspirations they hold. Sometimes raw, always revealing, these stories detail the indelible relationship between our money and our values. Taken as a whole, these essays powerfully demonstrate that there is no single 'right' way to save, spend, and invest. We see a kaleidoscope of perspectives on stocks, bonds, real assets, funds, charity, and other means of achieving the life one desires. With engaging illustrations throughout by Carl Richards, *How I Invest My Money* inspires readers to think creatively about their financial decisions and how money figures in the broader quest for a contented life. With contributions from: Morgan Housel, Christine Benz, Brian Portnoy, Joshua Brown, Bob Seawright, Carolyn McClanahan, Tyrone Ross, Dasarte Yarnway, Nina O'Neal, Debbie Freeman, Shirl Penney, Ted Seides, Ashby Daniels, Blair duQuesnay, Leighann Miko, Perth Tolle, Josh Rogers, Jenny Harrington, Mike Underhill, Dan Egan, Howard Lindzon, Ryan Krueger, Lazetta Rainey, Braxton, Rita

Cheng, Alex  
Chalekian  
**Comprehensive Financial Planning Strategies for Doctors and Advisors**

Changing Lives Press/Never Sink Books  
Financial Planning?The Next Step: A Practical Approach to Merging Your Clients' Money with Their Lives focuses on the way to structure a practice to ensure financial planners are focused on their clients' needs. A specialist in financial life

planning, Diliberto challenges the notion of asset-centered financial planning in favor of the client-centered approach. He uses stories, personal examples, and wisdom from his career to discuss how to plan holistically from the starting point'who is your client and what are their personal goals and needs?Not focused solely on the relationship with the

client, Diliberto shines a bright light on the practice itself. He examines how a firm is structured, who is part of the financial planning team, compensation, and effective and reasonable marketing for the financial planning firm.  
How Top Producers Sell  
Penguin  
With M&As in the RIA space increasing, many firms are rapidly changing hands with little to no expert guidance on

how to successfully execute a merger or acquisition. In 2017, a record number of M&A deals closed in the advisor space – 168 transactions, or a 22% growth over 2016. Aside from a fifth straight year of record highs in M&A activity, the size of the acquired firms has also increased, with average acquisitions involving wealth managers exceeding \$1.01 billion in assets under

management. For many advisors, it only takes a handful of missteps during a merger or acquisition to jeopardize their business, but with so much unknown, advisors need a guidebook for success. A significant and often overlooked component to a successful RIA merger or acquisition is the thoughtful integration of technology. This comprehensive guide walks you through the steps of

strategy, assessment, implementation, adoption and growth, all while considering how to best inspire and galvanize a firm's most valuable asset – its people. Combining the real-life experiences of a life-long financial advisor with the expertise of a 15-year operations director and founder of a large RIA ops network, this book takes real M&A experiences of the financial services industry and

offers best practices, tools and resources to help advisors make smart decisions about technology integration that elevates the firm's goals and solidifies its future success.

[How to Serve Your Clients](#)

[More Effectively and Operate More Efficiently](#)

Business Plus 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. **The Art of Creating an Inspiring Financial Strategy** John Wiley & Sons Why do some crises affect the stock market far more than others? What will happen to an individual's financial security when the next major terrorist attack occurs? When faced with disaster, why do investment advisors keep telling clients

to just be patient? Wall Street typically suggests that, when crisis hits, investors must put life on pause with the hope that someday, perhaps years later, portfolio values will return to normal. This standard "wait and see" approach involves sitting through chaos, confusion, and even long-term loss. The *Prepared Investor* offers an innovative and practical approach that reveals how the true story

<p>of investing through crisis is very different from the standard dogma that's accepted today. Christopher Manske demonstrates how readers can protect and grow their net worth in the face of calamity using twenty specific action steps built on an understanding of how different crises affect society and the investment markets. Like Outliers showed a different way</p>	<p>to look at success and Nine Lies About Work turned the establishment upside down on leadership and teams, Manske convincingly demonstrates that society's reaction to true crisis is absolutely predictable. In making this pattern clear, Manske offers a compelling and instructive approach to maximizing your portfolio despite tomorrow's uncertainty. From this vantage point, readers will</p>	<p>see why the investing world barely reacted when a disease killed more people than all the deaths attributed to both World Wars, how a few National Guardsmen sank the entire stock market, how the secret Napoleon knew explains investors' selling behavior, and why a simple statement from particular leaders can be just as much a crisis as an airplane flying into the World Trade Center.</p>
---	--	---

Investment concepts change with research and experience. Diversification, though accepted today, used to be a very controversial way to manage risk in a portfolio. Similarly, Wall Street did not always use a Risk Assessment Questionnaire to help investors select the proper investments. Manske challenges today's dogma surrounding crisis investing and suggests the time has come to change the story because, during a real crisis, "wait and see" is horribly inadequate. Wall Street's current approach leaves investors dependent on the promise that things will get better, but successful portfolio management in the face of major calamity is more proactive - and a lot more optimistic - than it seems on the surface. At its core, The Prepared Investor is about how training and preparation can help people to behave better than their instinctual reactions. By shining a light on how specific catalysts create certain patterns of behavior, Manske shows readers that if the crisis is new and threatening, the effect will be predictable and familiar. On the curious journey to answer the question, "How can investors protect and

grow their net worth in the face of crisis?" readers will come to understand how foolish it is for Wall Street to approach all types of calamity with the same "just hold on" solution. Using well-researched case studies, Manske explains why academics cannot agree on the actual start of the Vietnam War, what the coronavirus and advancing artificial intelligence have in common, why

the biggest danger to a portfolio during crisis is probably the owner's own natural instincts, and why it's important to get ready for tomorrow's crisis right now. Pulitzer Prize winner Peggy Noonan wrote in The Wall Street Journal, "You can't see all the world's weapons and all its madness and not know that eventually we will face a terrible day or days... Maybe it will involve nuclear weapons...an

attack on the grid, maybe bioterrorism. But it will be bad..." People know something's coming as they listen to the news warn of cybersecurity issues and North Korea's nuclear program. They read about extremists who take drastic steps to be prepared for anything from a dirty bomb to Ask a Manager Ews Communications The official CFP guide for career

excellence CFP Board Financial Planning Competency Handbook is the essential reference for those at any stage of CFP certification and a one-stop resource for practitioners looking to better serve their clients. This fully updated second edition includes brand new content on connections diagrams, new case studies, and new instructional videos, and a completely new section

devoted to the interdisciplinary nature of financial planning. You'll gain insights from diverse fields like psychology, behavioral finance, communication, and marriage and family therapy to help you better connect with and guide your clients, alongside the detailed financial knowledge you need to perform to the highest expectations as a financial planner. The only official CFP Board

handbook on the market, this book contains over ninety chapters that are essential for practitioners, students, and faculty. Whether a practitioner, student, or faculty member, this guide is the invaluable reference you need at your fingertips. Comprehensive, clear, and detailed, this handbook forms the foundation of the smart financial planner's library. Each jurisdiction

has its own laws and regulations surrounding financial planning, but the information in this book represents the core body of knowledge the profession demands no matter where you practice. CFP Board Financial Planning Competency Handbook guides you from student to practitioner and far beyond, with the information you need when you need it. How to Value,

Buy, or Sell a Financial Advisory Practice HMH  
 What is a safe haven? What role should they play in an investment portfolio? Do we use them only to seek shelter until the passing of financial storms? Or are they something more?  
 Contrary to everything we know from modern financial theory, can higher returns actually come as a result of lowering risk?  
 In Safe Haven, hedge fund manager Mark

Spitznagel—one of the top practitioners of safe haven investing and portfolio risk mitigation in the world—answers these questions and more.  
 Investors who heed the message in this book will never look at risk mitigation the same way again.  
Become Your Own Financial Advisor John Wiley and Sons  
 This IS NOT a boring discussion of life insurance written for actuaries, accountants

and attorneys. Instead, it's a collection of love stories told through the words of husbands and wives, moms, dads, and their families of how each was forever impacted by an act of love demonstrated through the simple purchase of a life insurance policy. Important lessons are woven through these real stories, instead of imaginary accounts where everything goes right and there's always

a happy ending. Sometimes life is difficult, but a disciplined thoughtful approach may prepare your family to preserve their respect and dignity even during the most challenging circumstances. These stories share the pain, anxiety and joy experienced by loved ones while illuminating the tools that you can use to take charge of your own financial life for the certainty and

security for those you love. As you read "Investments Don't Hug," have a highlighter nearby to mark important passages, and a pen at hand to make notes within the margins of its pages. It's also wise to have a box of tissues close by, as you pause to take in the emotional significance of its message through the tears shed by the narrators and the author. An important

virtue will come through loud and clear; expressing love for your spouse and love for your children by taking the important steps to insure that your love will continue on, by protecting and sheltering the lives of those you love from the financial losses that often occur by your own death. This journey takes you through the lives of couples and their families while providing gentle lessons

on how life insurance actually works, how much you may want to own and what type you may wish to purchase. Mark Bertrang, CLU(R), ChFC(R) is the creator of the Financialoscopy(R). As a professional communicator, broadcasting was his first career, but for more than a generation Mark has communicated the message of financial security. Engaging audiences at financial conferences

and industry meetings throughout the country provides an outlet to share his passionate message. His desire is for all advisors to serve their clients with the same passion, gentleness and care. Bertrang's practice centers on listening-believing that to truly understand a client takes more than a spreadsheet of numbers. Engaging a person's values, passions, and fears is often



the most important part of achieving measurable success for families. It is Bertrang's belief that the life insurance contract is a 'love covenant' put into a written document that allows your love to act as the foundation to continue beyond death. CRC Press Explains the primary asset protection and tax minimization strategies that work best for affluent investors, and looks at how to recognize market

anomalies and tailor investments to match personal circumstances .  
*Serious Money* John Wiley & Sons  
 Check out the Book Trailer for *Wealth by Virtue* [youtube.com/watch?v=r4qf5Er2CS0&t=1s](https://www.youtube.com/watch?v=r4qf5Er2CS0&t=1s)  
 Most people share a central fear: that at some point in their lives, they will need money and not have it. Wealth is the absence of that fear. *Wealth by Virtue* is a masterful explanation of

our financial world. The book is structured around The Six Areas of Finance: banking, investments, real estate, insurance, legal planning, and tax planning. Everything in your personal finances fits into these categories. By recognizing this structure, you make them all work together and put yourself on the path to wealth-optimized decisions. *Wealth by Virtue* is a personal

finance book that builds a conceptual framework to aim for a better financial future. In the **BANKING** chapter, it shows you: - how inflation is the most certain threat to personal finances - how most people don't make money in banks In the chapter on **INVESTMENTS**, it shows you: - how much the stock market performs each year - how using dividends for income can actually grow your wealth in

retirement In the **REAL ESTATE** chapter, it shows you: - why using extra money to paying off your house generally puts you in a poorer position than saving it up - how buying real estate shields from your biggest inflation threat In the **INSURANCE** chapter, it shows you: - why all insurance decisions begin with your insurable needs and how to calculate this - how to know if

you need long term care insurance or if you can self-insure In the chapter on **LEGAL PLANNING**, it shows you: - whether you should get a trust or a will - why putting "joint" on accounts and property can be a massive mistake In the chapter on **TAXES**, it shows you: - how people can receive Social Security tax free - how tax deferral does not usually help you **Wealth by Virtue** looks at your personal finances,

financial planning, and retirement planning as a comprehensive structure rather than as unrelated components. The Art of Marketing Mutual Funds John Wiley & Sons  
The best financial advisors are well equipped to succeed regardless of market conditions. Based on interviews with fifteen top advisors, each doing several million dollars worth of business every year, The Million-

Dollar Financial Advisor distills their universal success principles into thirteen distinct lessons. Each is explained step-by step for immediate application by veteran and new financial professionals alike. The lessons cover:  
\* Building and focusing on client relationships \*  
Having a top advisor mindset \*  
Developing a long-term approach \*  
Specialization \*  
Marketing \*  
And much more The

book also features two complete case studies. First there is the "best of the best" advisor whose incredible success showcases the power of all the book's principles working together in concert. The second is an account of a remarkable and inspiring career turn around and demonstrates that it's never too late to reinvent oneself. Brimming with practical advice from the author

and expert insights from his interview subjects, *The Million-Dollar Financial Advisor* is a priceless success tool for any and all financial advisors. *The New Financial Advisor* John Wiley & Sons Financial Planning for Teachers provides teachers, administrators, and other educational professionals with just the right amount of financial literacy to know what's important in planning for

the future. Written by Eric Nichols, CFP(r), CLU(r), RICP(r), CRPC(r), a financial professional who has spent the past ten years helping teachers and their families with their financial strategies, this book is here to guide you through the personal finance landscape. Over his many years of working with teachers with just about every imaginable financial condition, family

situation, and set of goals, Nichols has recognized a common theme: while teachers are generally very intelligent and caring individuals who know they need to plan for their futures, they typically prefer to have someone they trust handle it for them. The challenge, as they see it, is finding someone who will put their best interests first. Presenting all the essential information in a light, conversational

tone, this	professional	planning or
easy-to-use	and carve out	you're closer
educational	your path to	to retirement,
tool is	financial	you'll come
designed to	prosperity.	away better
help you work	Whether	able to meet
with your	you're just	your particular
financial	getting	needs.
	started in your	

Best Sellers - Books :

- [Jackie: Public, Private, Secret By J. Randy Taraborrelli](#)
- [Mad Honey: A Novel By Jodi Picoult](#)
- [Adult Children Of Emotionally Immature Parents: How To Heal From Distant, Rejecting, Or Self-involved Parents By Lindsay C. Gibson Psyd](#)
- [The Five-star Weekend By Elin Hilderbrand](#)
- [The Wager: A Tale Of Shipwreck, Mutiny And Murder](#)
- [The Complete Summer I Turned Pretty Trilogy \(boxed Set\): The Summer I Turned Pretty; It's Not Summer Without You; We'll Always](#)
- [Oh, The Places You'll Go! By Dr. Seuss](#)
- [Iron Flame \(the Empyrean, 2\)](#)
- [A Letter From Your Teacher: On The First Day Of School By Shannon Olsen](#)
- [House Of Flame And Shadow \(crescent City, 3\)](#)