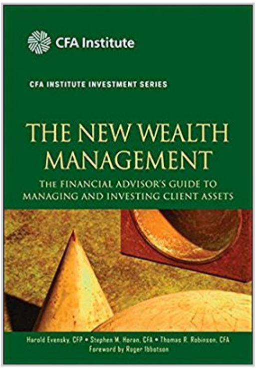

The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets

By Harold Evensky, Stephen M. Horan, Thomas R. Robinson

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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.

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Editorial Review

From the Inside Flap
Resources for professionals interested in portfolio and asset management abound, but not much is available for those managing private wealth or handling the portfolios of multiple clients. Now in its second edition, *The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client* Assets continues to remedy this by providing a comprehensive reference for financial planners with detailed and accessible guidance on developing optimal asset allocation policies for clients.

As part of the CFA Institute Investment Series, the book is designed for a wide array of readers, ranging from graduate-level students focused on finance to practicing investment professionals, and everyone in between.

More relevant than ever before, this newly revised edition by Harold Evensky, along with Stephen Horan and Thomas Robinson, provides you with the most up-to-date information associated with this important discipline.

Requiring customized solutions that address clients' individual needs, the wealth management approach is unique in the world of finance. Bringing together in-depth writings on the most important wealth management issues with expert opinions and recommendations, *The New Wealth Management* contains clear, example-driven coverage about how to place client objectives ahead of investment vehicles.

With the authors bringing their own unique experiences and perspectives to the study of wealth management, this book distills the knowledge, skills, and abilities you need to succeed in today's dynamic financial environment. Filled with in-depth insights and practical advice, *The New Wealth Management* is required reading for anyone interested in managing private wealth.

From the Back Cover
PRAISE FOR The new wealth management

"The business of wealth management is about more than exercising fiduciary responsibility over client funds. *The New Wealth Management* explains the importance of working to achieve client objectives beyond simply managing their money. This book is an advisor's road map to building and maintaining client wealth and well-being."
—**Meir Statman**, Glenn Klimek Professor of Finance, Santa Clara University, author of *What Investors Really Want*

"The wealth management industry is a work-in-progress. It is thus fitting that, once in a while, insightful authors take the time to collate the state of the current wisdom and create a book such as *The New Wealth Management*. It should be required reading for anyone practicing the trade, and many clients might also benefit. It is comprehensive, clear, and well written. It is hard to think of one good reason not to have this book by one's side, as the handbook to which one turns when faced with a challenge."
—**Jean Brunel**, Managing Principal, Brunel Associates

"*The New Wealth Management* is a masterpiece. Even the most experienced financial advisor has much to gain from this comprehensive, practitioner-focused manual. The well-crafted essays covering the most

important issues for today's wealth managers integrate the essential parts of the wealth management process. I highly recommend this outstanding book."
—**Michael Pompian**, CFA, CFP, Director, Private Wealth Practice, Hammond Associates, author, *Behavioral Finance and Wealth Management*

"Since *Wealth Management* was first published in 1997, it has been the authoritative guide for the wealth management profession. *The New Wealth Management* is a more than worthy successor—comprehensive, accessible, and written specifically for practitioners. No one who takes their practice and their profession seriously should be without it. It is the definitive 'how to' reference book for wealth managers."
—**Scott Welch**, CIMA, Senior Managing Director, Investment Research & Strategy, Fortigent, LLC

"Advisors working with investors of all types must not only have expertise, they must view the services they deliver through the eyes of the client. They must open broader conversations with investors about risk, investment acumen, and psychological biases. Through practical and situational application, this book guides advisors significantly in that direction. It is an excellent portfolio management resource which belongs in every advisor's library."
—**Lisa Gray**, Managing Member, Graymatter Strategies, LLC, author of *The New Family Office and Generational Wealth Management*

About the Author
Harold Evensky CFP, is President of Evensky & Katz, a nationally recognized wealth management firm. Acknowledged by *Financial Planning, Financial Planning Professional, Investment News*, and *Worth* as an industry leader, he served as chair of the TIAA-CREF Institute Advisory Board and is a member of the American Bar Association. In 1999, he was awarded the Dow Jones Investment Advisor Portfolio Management Award for Lifetime Achievement.

Stephen M. Horan, PhD, CFA, manages professional education and private wealth management content for CFA Institute members. He has served as both an editorial board member and abstractor for the CFA Digest and as an ad-hoc reviewer for the *Financial Analysts Journal*. He holds a PhD in finance, publishes frequently in academic and professional journals, and has authored several books. Prior to joining the CFA Institute, he was a professor of finance at St. Bonaventure University and principal of Alesco Advisors LLC.

Thomas R. Robinson, CFA, CFP, is Managing Director in the Education Division of the CFA Institute, where he leads and develops the teams responsible for producing and delivering educational content and examinations to candidates, members, and other investment professionals, including those affiliated with the CFA Program, CIPM Program, and Lifelong Learning.

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