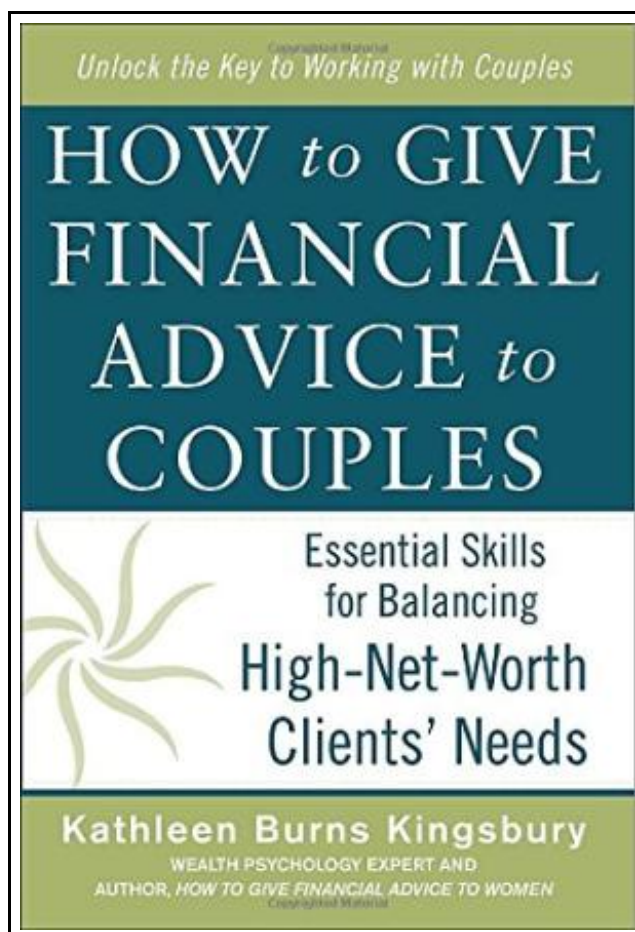


How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs



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Reviews

This written book is great. I am quite late in start reading this one, but better then never. You will not really feel monotony at at any moment of your time (that's what catalogues are for about when you check with me).

(Abe Reichel DDS)

HOW TO GIVE FINANCIAL ADVICE TO COUPLES: ESSENTIAL SKILLS FOR BALANCING HIGH-NET-WORTH CLIENTS' NEEDS

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McGraw-Hill Education - Europe. Hardback. Book Condition: new. BRAND NEW, How to Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs, Kathleen Burns Kingsbury, You can discover the secrets to attracting and retaining affluent couples. Fact: A startling 70 percent of widows fire the couple's financial advisor within one year of the death of their spouse - the main reason being that the advisor had failed to develop a trusting relationship with both partners. You can be the exception by developing the essential skills needed to be a couplefriendly advisor. And Kathleen Burns Kingsbury, a leading wealth psychology expert, shows you exactly how to develop these skills. How to Give Financial Advice to Couples teaches you how to avoid common traps like subtly siding with one member of the couple, failing to plan adequately with both partners, and sidestepping difficult financial conversations for fear of upsetting the wealth creator. A leading wealth psychology expert, Kathleen Burns Kingsbury reveals everything you need to know about the psychology of couples in order to serve them better. Along the way, she offers specific tips and techniques for managing the challenges inherent in advising traditional and nontraditional couples. Kingsbury reveals: the top myths about couples and money; the five tenets of couple dynamics and how they unfold in your office; strategies for encouraging the nondominant partner to speak up in meetings; techniques for facilitating financial conversations and mediating differences; and tips for empowering couples to raise financially intelligent children. You'll learn how to develop and articulate your couple's philosophy to establish expertise and credibility, how your couple's mindset impacts your work, and how being a couple-friendly advisor will set you apart from the competition. This one-of-a-kind handbook is the key to unlocking the secrets to attracting and retaining high-net-worth couples now and after difficult life...



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