

TAX-EFFICIENT INVESTING X

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MAXIMIZING RETURNS WITH SMART STRATEGIES

Tax Smart Investing Maximizing Your Clients Profits

Richard Imperiale



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Tax-Smart Investing Andrew D. Westhem, 1999-06-07 In *Tax Smart Investing* you will find an invaluable ally to help you guide your clients through the minefield of tax consequences of a wide range of investment vehicles. Investment professionals Andrew Westhem and Stewart Weissman reveal the tax traps that can snare the unwary and describe the sophisticated tactics they have developed to elude those traps. Written in a clear straightforward style and packed with practical examples, *Tax Smart Investing* is an indispensable guide for investment advisors, financial planners, accountants, and attorneys.

Keeping Clients for Life Karen Caplan Altfest, 2001-07-02 A successful financial planner is someone who does more than just crunch numbers and present an annual investment plan to clients. There is a psychological component to effective client care as well as to issues involving clients' overall financial well-being. People skills as well as financial planning skills are necessary to build a successful financial planning business. This comprehensive guide teaches both new and veteran financial professionals how to relate to their clients in meaningful ways, thus growing their business by increasing the long-term retention of those clients. Offered here are insights into such issues as how to determine which clients to accept, how to propose a plan, clients can use, how to tread carefully in family situations, how to develop sensitivity and communications skills, and how to work with the media and recognize the importance of building your business one lasting relationship at a time. Karen Caplan Altfest, PhD, CFP, New York, NY, is Vice President of L.J. Altfest Co., a financial planning and investment management firm. She is also the Director of the Financial Planning and Investments Program at the New School. J.K.

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Marc Lane, Chicago, IL, is a business and tax attorney. He is a Master Registered Financial Planner, Registered Financial Consultant, and Certified Investment Specialist. He has authored thirty books, is an Adjunct Professor of Business at the University of Illinois College of Business Administration's Institute for Entrepreneurial Studies, and an Adjunct Professor of Law at Northwestern University.

Fee-Only Financial Planning

John E. Sestina, 2002-02-28

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Julian Lowenthal, 2002-10-29

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Resources Investment Services Inc. Don't get left behind in the whirlwind of change impacting the financial services industry. Pick up J. K. Lasser's Pro Survival Skills in Financial Services and take control of your professional life within this dynamic and challenging business environment. Expert Financial Planning Robert C. Arffa, 2001-03-09 Praise for J. K. Lasser's Pro Expert Financial Planning: A gem of a personal financial planning guide. Dr. Arffa has prepared many of the chapters himself, and his highly readable and accessible overviews are presented with grace and clarity. Included also are discussions by industry professionals and leading investment thinkers. Readers seeking to enhance their financial security will be richly rewarded. Burton Malkiel, author of A Random Walk Down Wall Street. Here is top-level financial planning advice for professionals who counsel affluent clients as well as for savvy individual investors looking to make the most of their incomes for years to come. Featuring the expertise of some of our most articulate nationally recognized finance pros, this priceless book will take you through all the steps necessary to creating and realizing a financial plan that's right for your personal needs and goals. Learn how to set and prioritize goals, assess your current financial status, make projections for each goal, devise a strategy that includes spending, saving and investing, review risk management, track your financial progress, evaluate the tax consequences of investment decisions, select life and disability insurance, all with the help of leaders in their fields including John C. Bogle, Richard Driehaus, Peter Katt, Weston Wellington, Gregory D. Curtis, Jay Mueller, CFA and many more. **J.K.**

Lasser's Pro Estate and Business Succession Planning Russell J. Fishkind, Robert C. Kautz, 2002-01-04 EFFECTIVE ESTATE AND BUSINESS SUCCESSION PLANNING UNDER THE NEW TAX LAW. A properly designed and implemented estate and/or business succession plan is key to providing for and protecting loved ones in the most tax-efficient manner possible. A team of advisors must be assembled from the disciplines of law, insurance, finance, accounting and tax in order to create a plan that optimizes planning opportunities incorporating both the current state of law with the current state of one's mind. J. K. Lasser's Pro Estate and Business Succession Planning, Second Edition, provides you with a unique and comprehensive analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001, the new retirement distribution rules, Section 529 education plans and split-dollar insurance guidelines. It can help professionals and experienced individuals alike take advantage of opportunities presented by the new tax law, avoid common mistakes and understand complex estate and business succession planning techniques. Written by two attorneys who specialize in estate planning matters, this easy-to-read book provides you with complete information and strategies for a variety of issues including how to plan in light of the phased-in provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001, top twenty factors to consider when

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Advising the 60+ Investor Darlene Smith, Dale Pulliam, 1999-06-09 Advising the 60 Investor offers tax and financial planners an authoritative resource for the financial concerns of those who have retired or are about to retire Drawing on the combined expertise of tax finance and accounting professionals this book makes it easier for financial advisors to present their clients with a full range of planning strategies and to provide practical advice custom tailored to their clients individual circumstances An abundance of detailed real world examples illustrate many of the most common financial situations faced by older investors and handy computation aids and data tables make calculations clear quick and straightforward

Managing Family Trusts Rob Rikoon, 1999-07-12 Managing Family Trusts is an uncompromising nuts and bolts guide to the world of family trusts Written by a seasoned expert with many years of firsthand experience in the field it describes how financial professionals can help beneficiaries loosen the grip of unresponsive or inefficient trustees assert their rights as inheritors and assume greater responsibility for their own financial lives Managing Family Trusts provides a complete set of tools to all those concerned with the business of building better more satisfying fiduciary arrangements and presents a rare insider's view of how this world operates and details its unique challenges and rewards **Wealthbuilding** Kurt

Rosentreter, 2009-07-15 Rosentreter a senior financial advisor and insurance agent at a major financial services firm in Toronto presents a personal finance guide tailored to Canadians **J.K. Lasser Pro New Strategies for College Funding** Raymond D. Loewe, KC. Dempster, 2002 A PROFESSIONAL GUIDE TO PLANNING FOR COLLEGE FUNDING A properly designed college savings plan is key to providing a college education as well as the best way to avoid any surprises Yet many parents fail to realize how much time money and commitment are needed to accomplish this goal As an advisor you must guide your clients through this process with poise and confidence and J K Lasser Pro New Strategies for College Funding An Advisor's Guide with its companion CD ROM will help you do just that Filled with expert advice real world case studies and

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retirement funds to invest in real estate Using real estate IRAs you can combine the tax benefits of retirement funds with the high rates of appreciation in the real estate market growing your retirement investments by leaps and bounds This handy book shows you how Investing For Dummies Eric Tyson,2005-11-14 Do you have a few investments that you would like to develop into a full investment plan Would you like to know how to strengthen your portfolio Perhaps you want to roll your 401 k into a new plan Whatever your agenda is nowadays it s hard to find good advice on where to invest your money Now you ll have the ultimate one stop no nonsense guide to investing with Investing for Dummies Fourth Edition This updated bestseller provides fresh data and analysis on where to put your money and how to improve returns on IRAs and 401 k s as well as investing fundamentals like examining your investment options and considering risks and returns You ll have all the tools you need to Investigate and purchase individual stocks Buy bonds and other lending investments Select the right mutual fund Invest in the best stock bond and money market funds Choose a worthy brokerage firm Know when to invest in real estate Start and run your own small business Gather a collection of reliable investment resources This handy reference is packed with tips and advice on how to conquer important investment obstacles and what to consider when selling an investment as well as how to invest in a down market With Investing for Dummies Fourth Edition you ll soon have the power to turbo charge your investment and maximize your returns

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