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little wealth to acquire
more wealth by using sound
financial knowledge. Just
like you, we too, have
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that matters. This book aims
to share sound financial
principles; so, that you
know what "right" looks**

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competent professionals
with consumers that
desperately need their
service. Ron Butt, CFP has*

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been helping individuals and businesses accomplish their goals for over 30 years as a financial planner. In addition he established one of America's largest Registered Investment Advisory firms,

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for blog posts that will
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before you write so you can
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grow your firm and uncover a step-by-step process to build your marketing engine. About the Author Claire Akin, MBA grew up in the financial services industry working with her father, an independent

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financial advisor of over 35 years. She holds a bachelor's degree in economics and a master's of business administration. Claire founded Indigo Marketing Agency to help independent financial

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advisors reach more of their ideal clients. It's her mission to help financial advisors grow their firms through digital marketing.

There are many books written for the accounting and finance

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community. However, there are very few books written to help the non-financial career professionals who still need to understand the conceptual fundamentals of accounting and finance. In 20 years of

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information in leveraging their career without becoming overloaded with information that is not helpful to them. Learning this material takes repetition, application, and building the thinking processes

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the math. Dr. Julie Bonner is currently a tenured professor at Central Washington University in the information technology and administrative management department. Her career has spanned business

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and education for over 30 years. Initially, she received a Bachelor of Science degree in accounting, whereafter she earned an MBA and then a doctorate in organizational leadership.

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encounter in the process. The financial services industry is currently facing several key challenges: increasing competition, industry consolidation, rapidly changing technology, a soft market (for rates, premiums, and fees), and an increasing number of regulatory

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This book is a follow-up to the author's previous book The Financial Sales Handbook: A Professionals Guide to Becoming a Top Producer.

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Although this book is an extension of the first, readers can be confident in approaching it as a stand-alone book.

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practices. To the positive, these practices are among the most valuable professional service models in America. But almost all

advisors are assembling their practices using the wrong tools – tools borrowed from historically

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successful, but vastly different models including wirehouses, broker-dealers, and even OSJ's and branch managers. Revenue sharing, commission splitting and other eat-what-you-kill compensation methods dominate

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the independent sector and virtually ensure that today's independent practices, if left unchanged, will not survive the end of their founder's career. It is time to change course and this book provides the map and the details to help you do just that.

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For independent practice owners and staff members, advisors who want to transition to independence, as well as accountants, attorneys, coaches and others involved in the financial services space, there are invaluable lessons to be learned

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Put in the simplest of terms, selling is the exchange of goods and services for something of value. To financial advisors, however, the sale is often seen in a negative light, and many cringe at the word "sell." Interestingly, the same

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advisors who shy away from the concept of selling are often those who find themselves selling every single day! Sometimes they're even participating in the selling process multiple times throughout the day--and they may not realize it.

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Asking for client referrals, developing strategic alliances, seeking and talking with new prospects are all obvious parts of the selling process, but selling happens every time you remind a client why it's a good choice to do

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business with you, too. The fact is that most CFAs(R), CFPs(R), CPAs, and other professionals did not obtain these titles because

deep down they really wanted to be in sales. Most times, their interests tend more toward data, analysis,

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and more solitary orientations.

Selling is probably the last thing

those who entered these fields

were thinking of doing. They may

not have considered the "people"

aspect of their chosen profession;

the aspect that involves sales. For

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this reason, and some others, turning into a salesperson seems like a negative, degrading thing.

Many advisors will conjure up the picture of the slimy used-car sales guy. It's time to recognize selling as the valuable activity that it is. It is a

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their skills to the financial industry.

It is written in a clear,

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begins by discussing the operation

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business models of different types of Wall Street firms, as well as the job roles those with technical backgrounds can fill in those firms.

Then it describes the mechanics of how these firms make money trading the main financial markets

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areas of Wall Street technology and explains how financial models and systems are created, implemented, and used in real life. This is one of the few books that offers a review of relevant literature and Internet resources.

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Acquiring, retaining, and developing

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clients are the major steps for any successful business; failure to accomplish these steps is the major reason many professionals and firms fail to achieve their full potential. The financial services industry is currently facing its biggest challenge: increased

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competition; smarter buyers who want to deal with professionals instead of sales people; and the emergence of social media, including Facebook, Twitter, LinkedIn, and Google. The Financial Sales Handbook: A Guide to Become a Top Producer is for

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experienced professionals as well as for those who want to make the transition from managing work to more effective selling. The book is also for professionals who want to sharpen their skills. It is intended as the nucleus for corporate training programs as well as

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for self-employed professionals who must market and sell to stay in business.
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