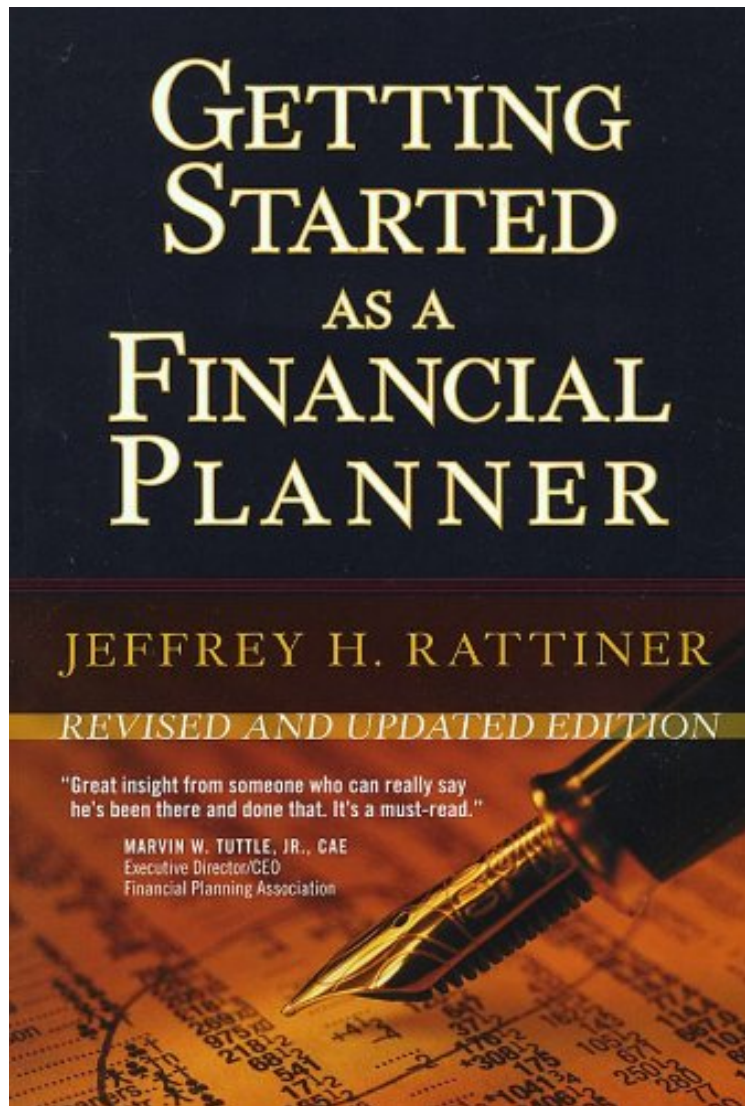


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There has never been more opportunity for financial planners--or more reasons for financial professionals to consider switching the direction of their careers into this lucrative field. Today's planners will cash in on the huge surge of baby boomers preparing for retirement in the decades ahead. And as the number and complexity of investments rises, more individuals will look to financial advisers to help manage their money. In the new paperback edition of this guide, Jeffrey H. Rattiner, a practicing financial planner and educator, provides a complete, systematic, turnkey framework for the aspiring planner to follow. Starting from the key question, "Why do you want to be a financial planner?" the author guides you through the development of an effective infrastructure and client management system for your practice. The many essential concepts are clearly illustrated with examples from practicing professionals. Throughout this handbook, Rattiner provides personal insights on how and why a planner must develop a solid understanding of client needs before building a comprehensive financial plan. Getting Started as a Financial Planner has everything you need to know--from how to set up a practice and communicate with clients to how to manage investments and market services--in order to launch a career in financial planning and to attain success in this high-growth profession.

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About the Author Jeffrey H. Rattiner, CPA, CFP, MBA, is president and CEO of JR Financial Group, Inc., a financial planning, money management, and tax information firm. Formerly the director of professional development and corporate sponsorship for the Institute of Certified Financial Planners, he also served as director of technical standards and as a technical manager of the Personal Financial Planning Division of the AICPA. He is the author of several books and a monthly columnist for Financial Planning magazine.