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Private Wealth Management: The Complete Reference for the Personal Financial Planner, Ninth Edition

G. Victor Hallman, Jerry S. Rosenbloom

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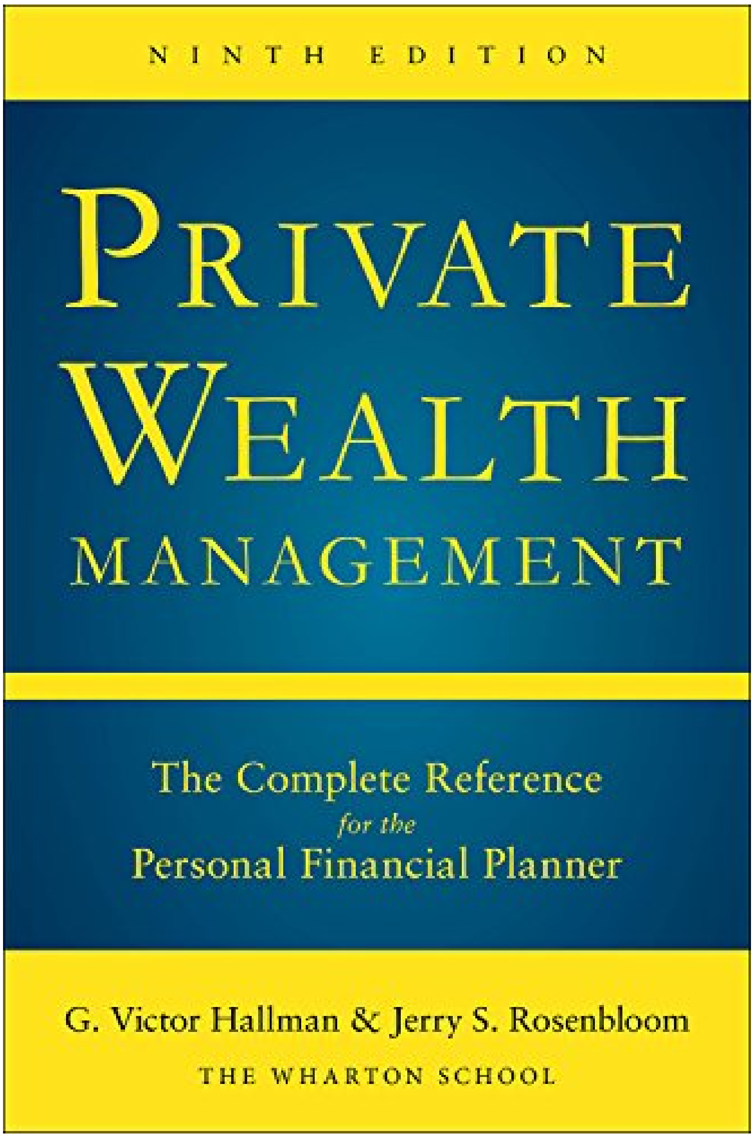

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Where financial advisors go for answers--revised and updated to address consequential legal and economic changes From the oil crisis and stock market crash in the 1970s through deregulation into the 1990s to the 2008 financial crisis--every financial planner worth their salt turned to Victor Hallman and Jerry Rosenbloom's classic reference for answers. To maintain its iconic position in the industry, this bible of wealth development moves into its Ninth Edition to ensure today's professional investors and financial stewards have reliable guidance to the latest legislation, economic developments, and wealth management trends and techniques. This latest edition of Private Wealth Management provides everything you need to operate with sophistication and savvy in today's markets--from setting financial objectives and executing the planning process to investing in equities and fixed-income securities to retirement income planning to methods for lifetime wealth transfers, and more. Written for the serious practitioner, this one-of-a-kind guide gives you a solid foundation for planning a prosperous financial future in the real world, which means it makes you an expert in: Major new tax legislation, including the "Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010" and the "American Taxpayer Relief Act of 2012" A variety of economic benefits and investment products Changes in individual annuities and retirement products with an increased focus on retirement planning Modifications to health and disability insurance The Patient Protection and Affordable Care and Health Care Reconciliation Act of 2010 Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010 New developments in estate and marital deduction planning such as "portability" This completely updated edition remains a wealth-building and income management tool by presenting many useful strategies, including those for dealing with the current "super-low" interest rates. Private Wealth Management, Ninth Edition, is the cornerstone of financial planning.

About the AuthorG. Victor Hallman is a Lecturer in Financial and Estate Planning in the Insurance and Risk Management Department of the Wharton School, University of Pennsylvania, as well as a member of the Pennsylvania Bar. Jerry S. Rosenbloom is the Frederick H. Ecker Emeritus Professor of Insurance and Risk Management and Academic Director of the Certified Employee Benefit Specialist (CEBS) Program at the Wharton School of the University of Pennsylvania. He is also a Senior Fellow in the Leonard Davis Institute of Health Economics and a Senior Fellow in the Financial Institutions Center at the Wharton School.