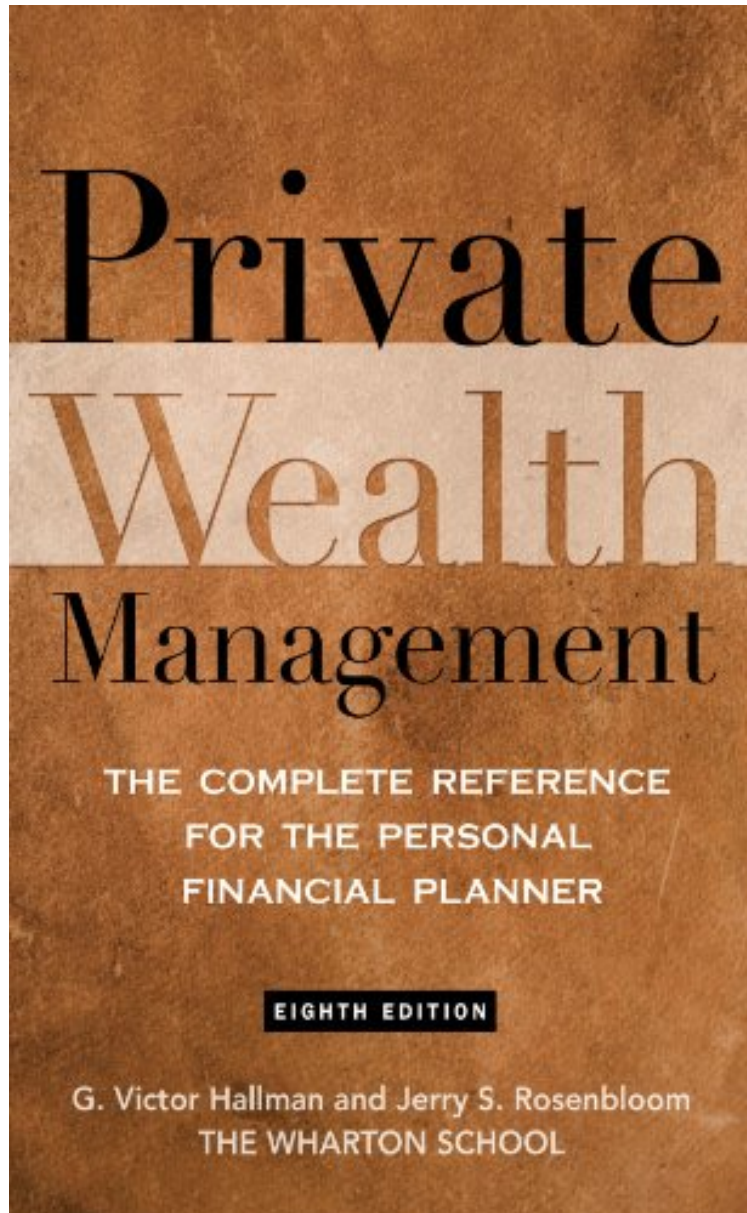


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concept. By Jacques Ferber I bought this book as part of a class I took as an undergraduate. I found the class very informative, but the information in this book is very helpful for those with limited to no background in private wealth management and are looking for somewhere to get started. I will say that it is helpful to have some financial background, but if not there is nothing you could not find out by doing some independent research on the internet. Overall I would say a good book for relative beginners as well as a nice reference book to have as you move forward in life. 0 of 0 people found the following review helpful. Good reference, but a bit dated--written during the financial ... By Anonymous Good reference, but a bit dated--written during the financial crisis. Not sure if all of the tax info. is up to date. 0 of 0 people found the following review helpful. Five Stars By lia lomidze good

The last 30 years have witnessed stock market booms and busts, economic prosperity and downturns, various presidential administrations, and technological revolutions. Through it all, Victor Hallman and Jerry Rosenbloom's classic guidebook, which previously was titled *Personal Financial Planning* in its first through seventh edition, has retained its status as the most accurate and up-to-date resource to help Americans protect their futures by investing wisely, insuring their families, and planning for their estates and retirements. Now, with *Private Wealth Management, Eighth Edition*, money managers and personal investors once again have a reliable resource of personal financial management guidance that is complete with essential new material addressing the latest trends in financial planning. These historic economic times call for new guidance. Hallman and Rosenbloom deliver with new chapters on asset protection planning, cash flow analysis, and interest accumulation concepts, as well as increased coverage of common stock investments and alternative investments. Additionally, in-depth and up-to-date attention is given to the Tax Relief Act of 2004 and the Pension Protection Act of 2006. This proven wealth-building tool features cutting-edge financial thinking and highreturn/ low-risk strategies in virtually every applicable area, including Index funds Value investing Dollar-cost averaging Fixed-income investing Profit-sharing plans Stock bonus plans 401(k) plans Simplified employee pension plans Estate planning Gift taxes Generation-skipping transfer taxes Income and capital gains tax planning Health insurance plans including HMOs Personal risk management From setting financial objectives and understanding the planning process to investing in equities and fixed-income securities, *Private Wealth Management* offers an effective, coordinated process that shows readers how to plan a prosperous financial future in today's no-guarantee financial environment.

From the Back Cover Proven strategies for getting the most from stocks, bonds, mutual funds, and more *Private Wealth Management* is the new title of the longtime leading financial planning resource (*Personal Financial Planning*) for private individuals and professional money managers. It has been reorganized and streamlined in a new, easier-to-use format that allows quick access to critical depths of coverage of Mutual funds Employee stock plans IRAs Estate and wealth conservation techniques Newer forms of life insurance Annuities This up-to-date edition helps readers create broader investment portfolios by revealing new information on alternative investing options—including hedge funds, ETFs, and REITs. Packed with insightful real-world examples, planning tips, charts, graphs, and case studies, this authoritative guidebook takes you step-by-step through the process of assembling a potent mix of investments, insurance, retirement plans, trusts, and other products to build and protect the long-term financial future of you and your family. Today's financial landscape offers great opportunity and numerous choices. *Private Wealth Management* is the road map you need for finding where to put your money now for a comfortable and financially secure tomorrow. About the Author G. Victor Hallman, Ph.D., is a lecturer in Estate and Financial Planning at The Wharton School. Jerry S. Rosenbloom is the Frederick H. Ecker Professor of Insurance and Risk Management and the Academic Director of the Certified Employee Benefit Specialist Program at The Wharton School.