



Getting Started as a Financial Planner

Jeffrey H Rattiner CPA CFP, Jeffrey H. Rattiner

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Growth in the financial planning field has skyrocketed -- drawing professionals from accounting and financial services to investment management. Now there is a book that addresses the needs of individuals contemplating or beginning careers in financial planning. This book presents a blueprint for launching a successful future in a lucrative, exciting profession.

Noted financial planning practitioner Jeffrey Rattiner covers everything aspiring and beginning planners need to know. He takes the reader through the basics of what financial planners do and provides insight about where the field is headed. Topics include education and certification requirements, options for specialization, fee structures, logistics and technology, compliance, and legal issues. Rattiner also shows planners the best methods for client prospecting and marketing, and lists helpful resources for ongoing education.

This easy-to-use guide gives a direct, turnkey approach to entering the field and setting up a financial planning practice. Special forms, checklists, and other useful tools reinforce the hands-on appeal of this practical guide.

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