Personal Financial Planning (Mcgraw-Hill / Irwin Series in Finace, Insurance, and Real Estate)

Lewis Altfest
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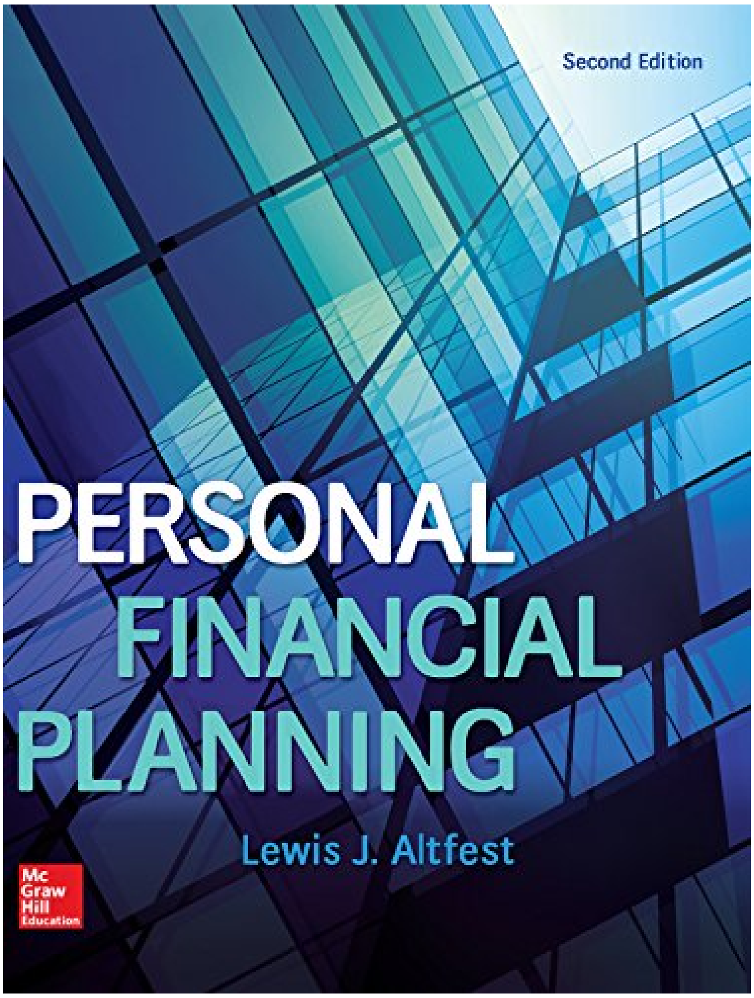

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Lewis Altfest : Personal Financial Planning (Mcgraw-Hill / Irwin Series in Finace, Insurance, and Real Estate) before purchasing it in order to gage whether or not it would be worth my time, and all praised Personal Financial Planning (Mcgraw-Hill / Irwin Series in Finace, Insurance, and Real Estate):

Personal Financial Planning brings a new level of analytical depth to this fast-rising field. Written for the financial professional Personal Financial Planning uses an original framework to make the material comprehensible to students while simultaneously providing a platform for further research and innovation within the discipline. Altfest's innovative Total Portfolio Management approach combined with an ongoing integrated case study provides a unique and powerful entry into this important subject.

About the AuthorLewis J. Altfest, Ph.D., CFP, CFA, CPA, PFSLewis J. Altfest has balanced a career in financial planning and investing with one as an associate professor of finance. He began as an accountant working for a then ldquo;Big 8rdquo; accounting firm and became a Certified Public Accountant. After some shorter-lived ventures, he joined the Wall Street firm of Wertheim and Co. in its investment research department. He held similar positions with Lehman Brothers and Lord Abbett Co.At Lord Abbett Co., an investment management firm, he rose to become Director of Investment Research, Chief of Long Range Strategy, and a general partner of the firm. At the same time, he began seriously pursuing a Ph.D. and teaching part-time. It was at Lord Abbett that Lewis Altfest decided to focus on helping individuals instead of institutions. He wanted to become the ldquo;Consumer Reports of Financial Planning,rdquo; that is, to provide unbiased financial and investment advice and to dedicate himself to instructing students and the public on financial matters.In 1982, he established a financial planning and investments firm along with another individual and in 1983 incorporated a firm performing activities by himself. At about the same time, he joined the faculty of Pace University as Associate Professor of Finance.His wife, Karen C. Altfest, joined him in business shortly thereafter (his son some 20 years later), and together they have established a nationally recognized multi-person financial and investment advisory firm, Altfest Personal Wealth Management Inc., located in New York City.Dr. Altfest has been active in financial planning industry matters for over 30 years, interacting with other planners nationwide, and has been an original member and a member of the board of directors of the National Association of Personal Financial Advisors and served on the board of directors of the IAFP New York Chapter, the predecessor of the Financial Planning Association, and on the board of the Educational Foundation of NAPFA as well. He was named one of NAPFArsquo;s 30 most influential advisors in 2013.Over the past 30+ years, Dr. Altfest has been named to Best Planners in the United States lists by Money magazine, Worth Magazine, Mutual Funds Magazine, and Medical Economics. Over the past 10 years and again in 2014 Barronrsquo;s named Dr. Altfest one of the ldquo;Top 100 Independent Financial Advisors in the Nation.rdquo; In 2014, he was inducted into Research magazinersquo;s Hall of Fame, and Dr. Altfestrsquo;s firm was named by Financial Times magazine as one of the Top 300. In 2014, he received The Best Practices Award Recognizing Altfest Personal Wealth Management as a Best Managed Firm by Investment News. He has been included among Bloombergrsquo;s ldquo;Top Wealth Managers.rdquo; He was also awarded the Lifetime Achievement Award by Financial Planning magazine.At Pace University, he has been active in many pursuits, including serving on the Universityrsquo;s employee benefits committee, chairing the Lubin Schoolrsquo;s Graduate Division tenure committee, and chairing the finance departmentrsquo;s recruitment and tenure committees. He has published academic research papers in financial planning and investing and has two other books, Introduction to Business (Harper and Row), and Lew Altfest Answers Almost All Your Questions about Money (McGraw-Hill), which he co-authored with his wife.Dr. Altfest participates in many professional and academic associations today, including the FPA, NAPFA, CFA Institute, and AICPA, and is an original member of the Academy of Financial Services. His advice and research have been quoted in such media as The New York Times, The Wall Street Journal, Newsweek, US News and World Report, Fortune, BusinessWeek, Money Financial Advisor, Financial Planning, Investment News, Bloomberg Wealth Manager, and Bottom Line, and he has written a monthly column for Medical Economics for over a decade. He has appeared on CBS, ABC, NBC, CNN, CNBC, and others. For his role in the development of the financial planning profession, the Business and Economics Alumni Society of the City College of New York chose Dr. Altfest as their 2006 Career Achievement Award recipient. Baruch College, the then undergraduate division of City College of New York, provided him with the Alumnus of Distinction Award in 2012. He has been named an Alumnus of the Year by CUNY Graduate Center Alumni Association, where he received his Ph.D. degree.