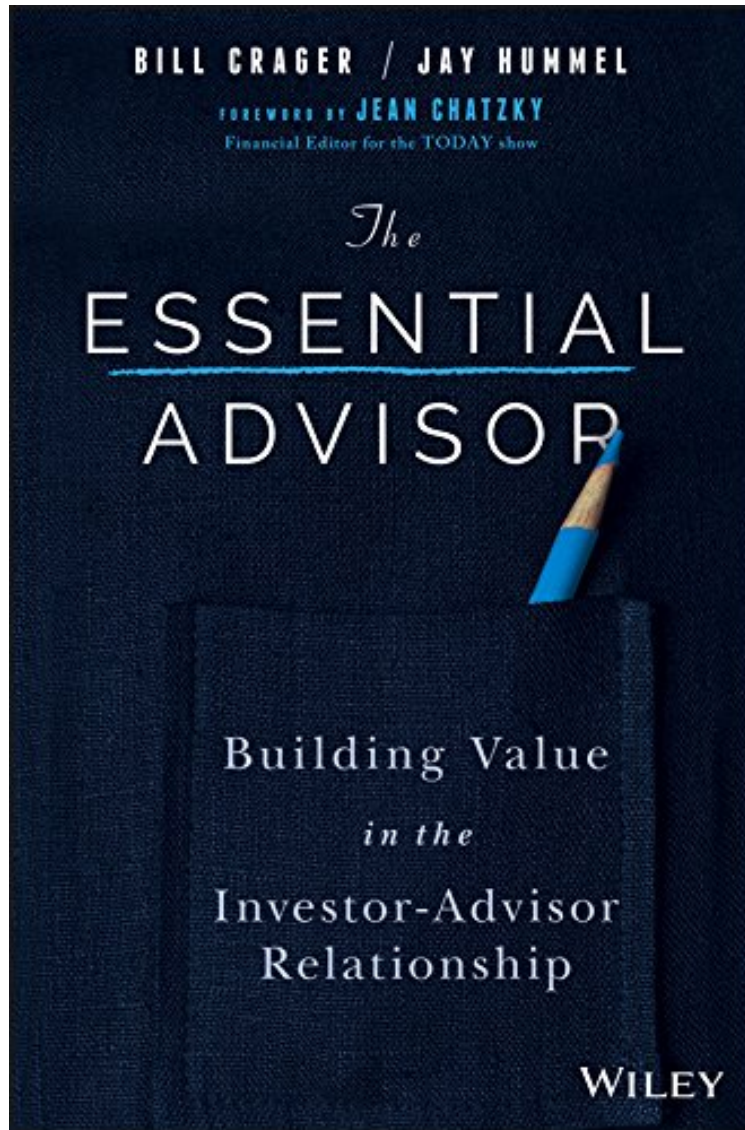


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## The Essential Advisor: Building Value in the Investor-Advisor Relationship

*Bill Crager, Jay Hummel*

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**Bill Crager, Jay Hummel : The Essential Advisor: Building Value in the Investor-Advisor Relationship** before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Essential Advisor: Building Value in the Investor-Advisor Relationship:

0 of 0 people found the following review helpful. Valuable Advice for AdvisorsBy Thomas LynemaThis book was enjoyable to read. My expectation was to gain an understanding into the life of an Investment Advisor and this book did not disappoint. It also details the competitive landscape for the Advising business. There are a lot of business

details listed in order to help the Advisor become better at their trade. It compels them to become better at marketing the value of financial advice. There are a lot of good recommendations in here for Advisors to expand and promote their business. Note that the authors make money if Financial Advisors are successful. This, to me, was a motivating factor in purchasing. The book seems of best use for those considering or participating in financial advising. It is also geared to the present-day situation of the industry. 1 star off because of the insane list price and doubts about the longevity of the message. 0 of 0 people found the following review helpful. Thoughtful guide to the business of financial advice. By CustomerGreat and timely addition to the collection of books on the business of financial advice. Although it is relatively early in the current digital evolution of the industry, Crager and Hummel do a great job of anticipating the results and helping to define the essential value proposition of the Financial Advisor. I particularly appreciated the addition of "the consumer perspective" written by Pam Krueger that strips away the industry jargon and summarizes key concepts from the perspective of the end user of financial advice- the client. 0 of 0 people found the following review helpful. Timely and well done. By CustomerForward looking book which anticipates many of the changes that advisors will have to go through in order to be relevant in today's ever-evolving digital age. The language and examples in the work are both advisor and consumer friendly. It will be a wake-up call for many advisors who have relied on traditional methods of garnering and keeping clients. It will also provide opportunity for consumers to shape their own value-based criteria for a present or future advisor relationship.

Leverage the financial services evolution to maximize your firm's value The Essential Advisor presents an insightful handbook for advisors looking to navigate the changing face of financial services. The industry is evolving, consumers are evolving, and many advisors are being left behind as old methods become less and less relevant. This book shows you how to turn this shift into a positive, by positioning your firm to maximize these new opportunities, and deliver the results and experience increasingly expected of financial advisors. You'll learn how to provide the transparency, hands-on interaction, and around-the-clock access today's clients demand, and how to consistently deliver service that robo-advisors cannot duplicate. Emerging technologies do not have to be a threat to your practice; they are tools that represent opportunities to provide greater service to your clients, and smart technology integration will be a hallmark of firms that survive the shift. This guide provides a clear vision of the future of financial services, and an indispensable management framework for maximizing your firm's future value. Advisors are increasingly confused about what clients are seeking, and clients are equally confused about what advisory firms offer that alternatives cannot. This book helps clear the air on both sides by examining the client's perspective of financial services, and helping advisors better communicate their strengths. Articulate the value of your services Leverage new technology to complement your practice Capitalize on opportunities and maximize your firm's value Position your firm to benefit from the changing consumer population Financial advisors can only grow their businesses if clients know what they do, know how to hire them, and can access them affordably. The Essential Advisor shows you to bring your firm into the future successfully.

From the Inside Flap There is a growing gap in the investing industry that has left advisors increasingly confused about what clients want and clients equally confused about what advisory firms can do for them. The Essential Advisor clears the air on both sides by including the client's perspective of financial services while laying out a concrete framework every advisor can use to better communicate his or her value. Automation is part of the new investing landscape, but computers alone can't manage and grow wealth as well as a human being skilled at leveraging digital tools. The easy-to-follow, conversational style in this refreshing guide shows you how to deliver the transparency, hands-on interaction, and around-the-clock access of robo-advisors, along with the consistent, better-than-expected returns of personal judgement. Every chapter conveniently includes key takeaways and a standalone section diving into the client's perspective on the covered topic in order to enhance learning and provide a quick reference. Advisors who follow the principles outlined here and commit to crossing the digital divide between themselves and investors immediately increase in value and quality of service to current clients and attract potential clients looking for customer-centric wealth management. The book also brings realistic and refreshing insights for consumers on what they should expect in a relationship with an advisor. This complete guidebook allows advisors and investors to: Close the trust gap between the parties by applying experienced insight, best practices, and digital techniques Identify the new technologies advisors should leverage and clients should expect to drive an outstanding investor experience Deliver better outcomes to clients by gaining efficiencies to invest more time in client relationships The financial services industry is evolving, and adapting isn't hard when you have experts guiding you through it. The knowledge transferred in this book shines a spotlight on the importance of good financial advice now and into the future, built around The Essential Advisor. About the Author BILL CRAGER is the president and cofounder of Envestnet, where he leads platform, product, and marketing strategy. He has been a driving force behind the firm's sixteen-year rise to be the leading managed solutions service provider in terms of total platform assets and financial advisors served. JAY HUMMEL is managing director, Strategic Initiatives and Thought Leadership at Envestnet. Hummel leads the firm's advisor training, consulting, and content development activities. Prior to joining Envestnet, he was the president and

COO of a large RIA based in Cincinnati, Ohio.