Don t Let Your Clients Eat Dog Food When They re Old!: A Financial Professional s Guide to Retirement Cash Flow Management (Paperback)

By roger Roemmich

iUniverse, United States, 2014. Paperback. Book Condition: New. 229 x 152 mm. Language: English . Brand New Book ***** Print on Demand *****.No hard-working American wants to resort to eating dog food when they are old. With approximately seventy-eight million Americans in the baby boom generation and nearly half of them with little or nothing in retirement accounts, this can be a challenging time for the financial advisors, tax attorneys, certified public accountants, and insurance sales associates in charge of retirement planning for a diverse clientele. In his guidebook, Roger Roemmich presents an integrated approach to client retirement planning and management that demonstrates how to fit all the pieces of the puzzle together to create a sound action plan while advising clients before and after retirement. Roemmich-with four decades of experience in the financial arena-shares his time-tested advice that includes tools for assessing retirement readiness with his unique CAMP score, educational handouts for clients, and detailed case studies that illustrate core concepts on integrating investment strategies with strategic planning regarding Social Security timing, Medicare supplemental insurance, and long-term care options. Don t Let Your Clients Eat Dog Food When They re Old! provides financial planners with valuable wisdom and innovative...

Reviews

A superior quality book along with the font employed was exciting to see. It is one of the most amazing book i have got read through. You wont really feel monotony at anytime of the time (that's what catalogs are for about in the event you ask me).
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