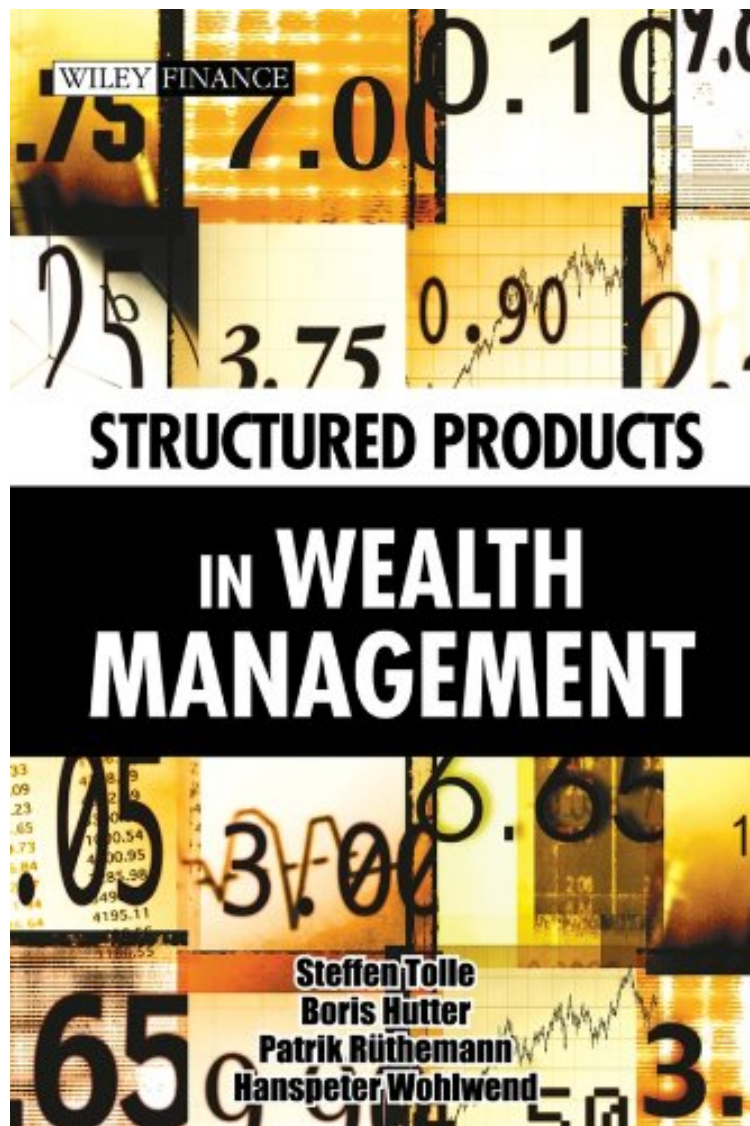


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Structured Products in Wealth Management (Wiley Finance)

Steffen Tolle, Boris Hutter, Patrik Ruuml;themann, Hanspeter Wohlwend
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Steffen Tolle, Boris Hutter, Patrik Ruuml;themann, Hanspeter Wohlwend : Structured Products in Wealth Management (Wiley Finance) before purchasing it in order to gage whether or not it would be worth my time, and all praised Structured Products in Wealth Management (Wiley Finance):

2 of 2 people found the following review helpful. Readable, yes. Complete, no. By aulachs This is another strange book. It only has 4 chapters, and 2 of them really donrsquo;t need to be there. The background material on derivatives (41% of the book) and on investment policy (19% of the book) are things most people who read books like this will already be familiar with. Chapter 4 (20% of the book) is really what most readers are after. So, I paid about \$95 for 40 pages of text. The multitude of graphics are nice, but the wide margins leave the impression that the authors were

trying to make their text look longer than it really is (we all did this in the 10th grade, right?) I am reading the Blumke book too – maybe between the two books I will have what I was looking for. Excellent for an undergraduate student or a stock broker who just needs the "top of the waves" view. If you read more technical stuff or have three-letter designations after your name, you could probably skip this one.

Structured products in the form of equity-linked derivatives have seen a rapid rise in popularity in the field of wealth management. Structured products are combinations of derivatives and traditional financial instruments such as stocks and bonds. The various components are combined into a single financial instrument and securitized. Discusses the characteristics and practical applications of structured products. In addition to providing a description of the structured products, this book focuses on their practical applications, showing how they can generate added value as part of an integrated investment process. Colourful charts help present the material in an attractive, real-world context.

From the Inside Flap Structured products in the form of equity-linked derivatives have seen a rapid rise in popularity in the field of wealth management. As their usage becomes more widespread, so has the need for a better understanding of how they work in a portfolio context. Structured Products in Wealth Management is a practical and efficient guide to the use of structured products in portfolio management. It provides a comprehensive description of structured products and their practical applications. It also demonstrates how they can generate added value as part of an integrated investment process and illustrates its systematic use in daily portfolio management. Experience in everyday investment practice shows that selecting and combining innovative new products at random is rarely a recipe for successful investment management. Structured Products in Wealth Management is the title of the English translation of the original book *Strukturierte Produkte in der Vermögensverwaltung*, previously published in German (3rd edition), French and Italian. The English-language version has been fully reworked and adapted for the English-speaking and international markets. Colorful charts help present the material in an attractive, real-world context. Written by a team of derivative specialists, the book addresses itself to investors, wealth managers, client relationship managers, students, as well as anyone with an interest in the financial markets. All four authors have long-term experience and know-how in developing and using structured products in wealth management. From the Back Cover A worthwhile guide on the use of structured products in private wealth management, written in a very accessible style. This book should be of value to all retail private investors and their advisors. - Professor Moorad Choudhry Over recent years, structured products have increased in their diversity and complexity whilst becoming more readily available to the individual investor. Beyond basics, *Structured Products in Wealth Management* facilitates their practical application by clearly articulating how they work and how they can be incorporated to strategically optimize an investment portfolio - a valuable resource for anyone involved in the financial markets. - Brendon C.W. Seeto This is an excellent book explaining the use of derivatives and of structured products in wealth management by highly successful pioneers in this use. This book is written at a level that makes it helpful to investors as well as to investment advisors. It will not only help them avoid mistakes, but more importantly make better use of financial instruments to achieve their investment objectives. - Professor Rene M. Stulz About the Author Dr. Steffen Tolle studied business administration at the University of St. Gallen, majoring in finance and accounting. He completed his PhD in 1993 with a dissertation on "Dynamic Hedging Strategies with SMI Futures." After joining Wegelin Co. Private Bankers in 1991, he took over as head of Products and Trading in 1996. He has been a managing partner since 1999. Today he is head of Advisory and Wealth Management at Wegelin Co. Boris Hutter joined Wegelin Co. Private Bankers in 2001 after studying economics at the University of St. Gallen with a major in finance and capital markets. He is involved on a daily basis in the launch of new structured products. Patrik Ruthemann, CFA, studied business administration at the University of St. Gallen. After completing his studies he joined the Structured Products department of Wegelin Co. Private Bankers in 2000. Today he is head of Products and Trading and became a managing partner in 2007. Dr. Hanspeter Wohlwend studied business administration at the University of St. Gallen, Majoring in banking. In 2001, he completed his PhD in financial market theory at the same university with an empirical study of the Swiss market for structured products. Since 1995, he has held various positions at Wegelin Co. Private Bankers, including head of Investment Process and Portfolio Management. Today he is responsible for the bank's Operations as a managing director.