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Wealth Management in the New Economy: Investor Strategies for Growing, Protecting and Transferring Wealth

Norbert M. Mindel, Sarah E. Sleight
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Norbert M. Mindel, Sarah E. Sleight : Wealth Management in the New Economy: Investor Strategies for Growing, Protecting and Transferring Wealth before purchasing it in order to gage whether or not it would be worth my time, and all praised Wealth Management in the New Economy: Investor Strategies for Growing, Protecting and Transferring Wealth:

1 of 1 people found the following review helpful. A Must-Read!By J. BursteinWealth Management in the New

Economy provides a no-nonsense look at financial planning and money management and speaks to those of us who don't know the difference between a stock and a mutual fund. Mindel's presentation of the history leading up to the current market situation, and how this history formulated his sustainable investment strategy, provides an easy-to-understand context within which to think about your own financial plan. Mindel is honest about his experience "making all the mistakes in the book" and guides his readers to make knowledgeable financial decisions with the help of an experienced financial adviser. Wealth Management in the New Economy fills a niche the mainstream media are not addressing - how to manage risk in order to accumulate wealth over the long-term. This book is a must-read - whether you are new to investing, or have been in the game for years. 1 of 1 people found the following review helpful. "First Person" view of how to make smart decisions about your investments By C. Etter As a Financial Advisor, I found this book one I'd like my clients to read. By writing in the first person, Norm shares his personal touch while providing a practical thumbnail history of how portfolio theory evolved; an easy to read account of what happened in the markets during the the past two years as well as an easy to understand explanation of the activities that lead up to it. More importantly, he explains the risks involved in your investments going forward and why diversification is critical. He also discusses the broad range of wealth management tools that need to be considered as our life expectancies continue to lengthen such as long term care insurance, guaranteed life time income annuities and how to pass down a family business. Thank you for putting it all together in one book! 0 of 0 people found the following review helpful. Wealth Management in the New Economy By Steven Hennessy The author, Norbert Mindel, has written an excellent book for the investor. He points out the greed of Wall Street, and the fact that the investor takes all the risk, while Wall Street collects all the fees. Conservative investing using fixed and fixed index annuities is a conservative but growth-oriented way to grow a retirement nest egg. Investing with Wall Street is like enjoying a trip to a casino. You really don't make any money until you cash in your chips, and most investors don't until they have to. I highly recommend Mr. Mindel's book for it's easy-to-read perspective of investing money.

A practical guide to managing wealth in modern times Wealth Management in the New Economy addresses a wide array of wealth management topics and established financial theories. Author Norbert Mindel has successfully advised his clients for more than three decades in the business. Now, with this new book, he shares the wisdom he has acquired and offers valuable insights into successful wealth management in an economy that has changed dramatically over the past year. Along the way, Mindel explores the essential aspects of this discipline, including the keys to wealth creation, properly managing risk, asset protection, planning for a prosperous retirement, and many other issues that you need to understand in order to survive and flourish in today's economy. While market forces are far too complex to be fully predicted or exploited, it is still possible to protect and grow your-or your client's-wealth. Wealth Management in the New Economy will show you how to achieve this important goal. Reveals how you can reduce market risk by using proven theories of portfolio management Written by accomplished financial advisor, attorney, and CPA Norbert Mindel Lays out strategies wealth managers and investors both can use to protect and grow wealth in the new economy For practical financial guidance you can count on, look no further than Wealth Management in the New Economy.

In Norm Mindel's Wealth Management in the New Economy, he expounds a model of wealth management that goes beyond just chasing returns, while pointing up the flaws and myths inherent in many popular strategies. It's worthwhile advice. --webCPA From the Inside Flap Wealth Management in the New Economy addresses a wide array of important issues in this dynamic field. Author Norbert Mindel; an accomplished financial adviser, attorney, and CPA; has successfully guided his clients for more than three decades in the business. Now, with this new book, he shares his story and the wisdom he has acquired, and offers valuable insights into managing wealth in an economy that has changed dramatically over the past few years. Along the way, Mindel explores the essential aspects of this discipline, including the keys to creating and managing wealth, the importance of accepting and managing risk, planning for a long and prosperous retirement, understanding the role of insurance, and much more. His own story, along with the stories of his clients, bring this book to life and make it both interesting and compelling reading. While market forces are far too complex to be fully predicted or exploited, it's still possible to protect and grow your; or your client's; wealth. Wealth Management in the New Economy will show you how to achieve this important goal. Divided into five comprehensive parts, this practical guide: Outlines a proven investment philosophy that both wealth managers and investors can use to protect and grow wealth in the new economy Reveals the most efficient way to turn wealth into a stream of income to last the rest of your life; no matter when you retire or how long you live Offers ample examples of the myths, errors, illusions, and delusions that can trip up investors, advisers, and money managers Addresses how to organize an entire estate so that you can enjoy your assets during life, but pass them on as you wish after death And much more For practical financial guidance you can count on, look no further than Wealth Management in the New Economy. With it, you'll discover how to manage and protect your money for the rest of your life. From the Back Cover Praise for Wealth Management in the New Economy "Norm always understood the obvious but the obvious was not obvious to most. He has a way of explaining complex concepts so everyone can understand. In

my years in business, he ranks as the most interesting person I ever worked with."mdash;David S. Reedy, former President, Genworth Financial Investment Services "This unique book has all the information you need to manage your wealth for the rest of your life, but Norm makes the complex content interesting and accessible. Norm includes the story of his own successes and disappointments over an entire career, to the great benefit of his readers. This book is good for anyone who wants to learn about managing wealth, from the most knowledgeable to the strategically impaired."mdash;John W. Ryan, PhD; President Emeritus, Indiana University; Chancellor Emeritus, State University of New York "The crisp prose and lively story help shed light on a usually dense subject. This lively and accessible analysis of very complicated subject matter should be a 'must read' for anyone who needs a better understanding of wealth management."mdash;Paul J.J. Payack, President, The Global Language Monitor "Do read Wealth Management in the New Economy. Norm Mindel and Sarah Sleight have written a book of reasoned judgment and surpassing good sense that will benefit any investor with assets to protect during these treacherous times."mdash;Phil DeMuth, PhD, Managing Director of Conservative Wealth Management LLC and coauthor of The Little Book of Investing Do's and Don'ts "This book exposes many of the dark secrets of the financial services industry. The choice;is yours. . . you can remain in the dark and permit yourself to become a victim, or you can shed light on them to protect yourself by reading this book."mdash;David Loeper, President and CEO, Financeware, Inc; author, Stop the Retirement Rip-Off and Stop the Investing Rip-Off