



Someday Rich: Planning for Sustainable Tomorrows Today (Wiley Finance)

Timothy Noonan, Matt Smith

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To truly be successful, today's financial advisor must strike the right balance between effectively engaging with his or her clients and finding meaningful ways to maintain their financial security. By framing your mission in this way, you can help your clients clarify their vision, build a plan to achieve it, and manage that plan so they stay on track.

Nobody understands this better than authors Timothy Noonan and Matt Smith—two seasoned financial professionals with over five decades of combined experience working in the asset management business. And now, in *Someday Rich*, they show financial advisors with clients who are rich, or have the opportunity to become rich, how to sustain a client's desired lifestyle to, and through, retirement.

Engaging and informative, *Someday Rich* provides the context, description, and implementation suggestions for the Personal Asset Liability Model—a process that will allow you to determine a client's funded status relative to their future spending needs as well as develop and monitor their investment plan accordingly. While the methods in the Personal Asset Liability Model may not have been practically accessible to past advisors with a large number of clients, this model now brings together the technical methods to answer important client questions in a way that is feasible and includes the communication strategies that can make the delivery of the advice model more effective.

Along the way, this reliable resource discusses the business of giving good advice and addresses how to incorporate these steps into a client engagement road map. Insights on various other issues associated with this discipline are also included, such as how to develop client trust and deliver personalized service when you have so many clients, and contingency risks—life, health, disability, and long-term care—that need to be considered in the financial planning process. And in later chapters, single-topic essays, contributed by experts in the financial planning field, cover issues ranging from target date funds and the investment aspects of longevity risk to modern portfolio decumulation.

Building more valuable relationships with your clients is a difficult endeavor. But with *Someday Rich*, you'll discover what it takes to achieve this goal as you put them on a path to a sustainable financial future.

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