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DIY Financial Advisor: A Simple Solution to Build and Protect Your Wealth (Hardback)

By Wesley R. Gray, Jack R. Vogel, David P. Foulke

John Wiley Sons Inc, United States, 2015. Hardback. Condition: New. 1. Auflage. Language: English . Brand New Book. DIY Financial Advisor: A Simple Solution to Build and Protect Your Wealth DIY Financial Advisor is a synopsis of our research findings developed while serving as a consultant and asset manager for family offices. By way of background, a family office is a company, or group of people, who manage the wealth a family has gained over generations. The term family office has an element of cachet, and even mystique, because it is usually associated with the mega-wealthy. However, practically speaking, virtually any family that manages its investments independent of the size of the investment pool could be considered a family office. The difference is mainly semantic. DIY Financial Advisor outlines a step-by-step process through which investors can take control of their hard-earned wealth and manage their own family office. Our research indicates that what matters in investing are minimizing psychology traps and managing fees and taxes. These simple concepts apply to all families, not just the ultra-wealthy. But can or should we be managing our own wealth? Our natural inclination is to succumb to the challenge of portfolio management and let an...



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