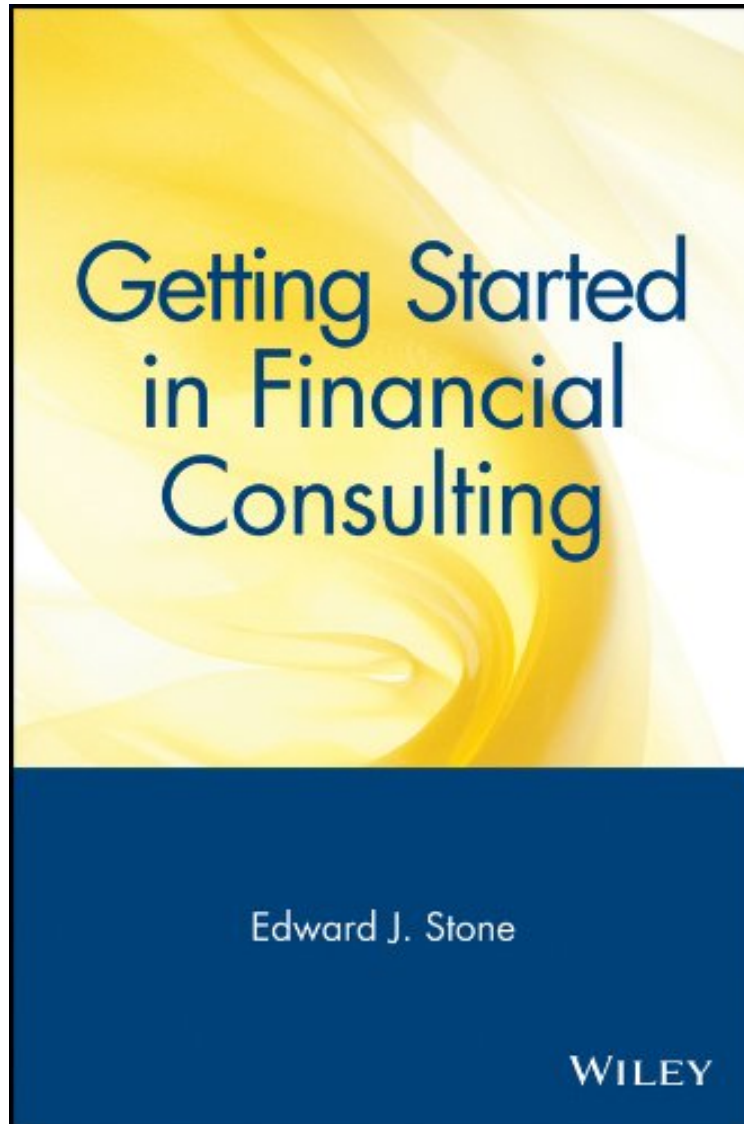


(Mobile book) Getting Started in Financial Consulting (Getting Started In.....)

Getting Started in Financial Consulting (Getting Started In.....)

Edward J. Stone

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on getting ready to be a financial consultant. 2 of 3 people found the following review helpful. Way outdated By Old-and-Wise I borrowed this book from my local library back in 2001 when I was getting into the financial planning business, and it gave me some basic information. It was easy to read, but I never felt I could trust what the book said, because it all sounded "too easy." But it was an eye-opener, hence the 3 stars. But, this book is now six years old, so it's of very little value to someone wanting to get started. The only book on this topic that's been updated is Jeffrey Rattiner's "Getting Started" book, but that's more toward starting an FP business. Another expensive book by an author named Nancy something offers too little for the \$55 price; besides you cannot trust that book's reviews on because all the positive ones seemed planted by the same person. So check out Rattiner's book (2005 edition) to see if it's right for you. 35 of 40 people found the following review helpful. Complete, concise and very helpful to those considering FC. By A Customer Getting Started in Financial Consulting by Edward J. Stone is a well written description of what you need to do for a career in Financial Counseling. It is well organized, complete and provides inside information on what it takes to get started, run a business, and be a successful Financial Counselor. The review of the various certification programs is quite extensive. This book can be considered the bible in not only in getting started in Financial Counseling, but in making it a career. It is also helpful for present Financial Counselors to use as a benchmark to measure up to Mr. Stone's high standards that are essentially required in this profession. Follow his guidelines and you will be successful over the long term. A must read if you are considering going into Financial Counseling.

Comprehensive Coverage Completely Up-to-date! A detailed road map for getting started as an independent financial consultant Each year, thousands of people from all walks of life leave the security of their nine-to-five jobs to pursue careers as independent financial consultants. For a great many of them, the experience is financially and personally rewarding beyond their expectations. If you, too, are thinking about taking the big leap into becoming a financial consultant, but you aren't sure how to go about it, this book is for you. How can I be sure that financial consulting is right for my personality? What kinds of training and skills do I need to succeed, and how do I get them? What special licenses or certification are required? How do I find clients and build lasting relationships with them? With the help of first-person accounts from successful financial consultants from across the country, expert Edward J. Stone provides complete answers to these and all your questions concerning: * Acquiring and honing key skills, including the all-important "people" skills * Organizing and structuring your business * Indispensable software tools * Services you can offer clients and why you should specialize * Marketing your services, targeting clients, and building a solid core clientele * Why you should become certified and how to go about it * Profiling clients and drawing up formal financial plans * Dealing with state and federal regulations * Contracts and key legal considerations * Surviving in a down market

From the Back Cover Comprehensive Coverage Completely Up-to-date! A detailed road map for getting started as an independent financial consultant Each year, thousands of people from all walks of life leave the security of their nine-to-five jobs to pursue careers as independent financial consultants. For a great many of them, the experience is financially and personally rewarding beyond their expectations. If you, too, are thinking about taking the big leap into becoming a financial consultant, but you aren't sure how to go about it, this book is for you. How can I be sure that financial consulting is right for my personality? What kinds of training and skills do I need to succeed, and how do I get them? What special licenses or certification are required? How do I find clients and build lasting relationships with them? With the help of first-person accounts from successful financial consultants from across the country, expert Edward J. Stone provides complete answers to these and all your questions concerning: * Acquiring and honing key skills, including the all-important "people" skills * Organizing and structuring your business * Indispensable software tools * Services you can offer clients and why you should specialize * Marketing your services, targeting clients, and building a solid core clientele * Why you should become certified and how to go about it * Profiling clients and drawing up formal financial plans * Dealing with state and federal regulations * Contracts and key legal considerations * Surviving in a down market About the Author Edward J. Stone has been a full-time consultant, specializing in the financial and business computing industries, for more than a decade. He is the editor of the Journal of Corporate Accounting and Finance, and the editor/writer of the newsletter Banks in Insurance Report.