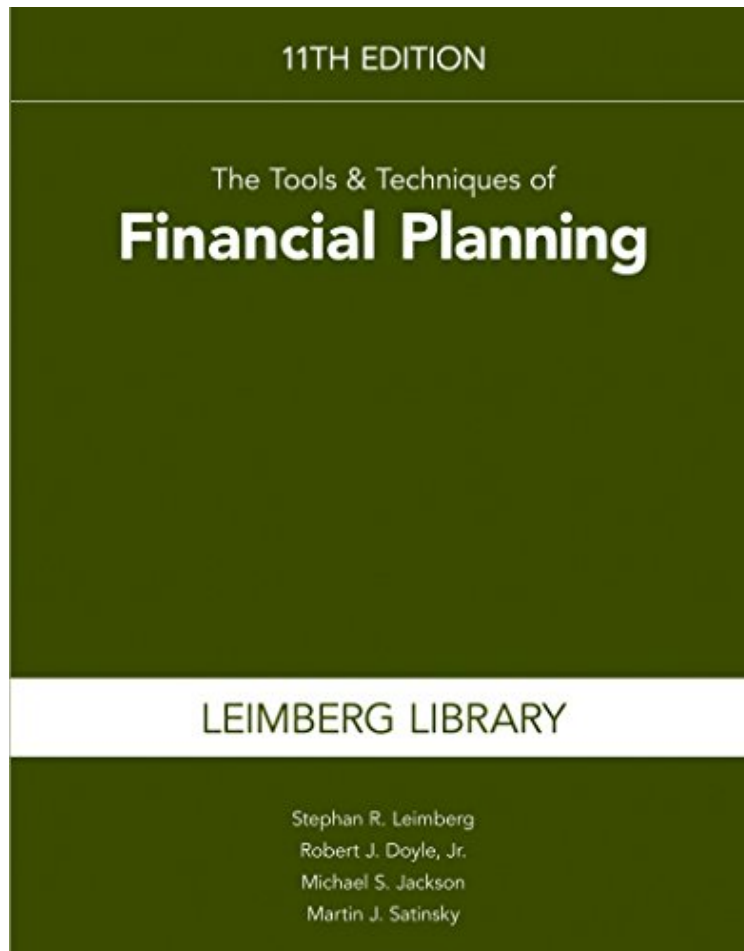


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The Tools Techniques of Financial Planning

Stephan R. Leimberg, Jr. Robert J. Doyle
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Stephan R. Leimberg, Jr. Robert J. Doyle : The Tools Techniques of Financial Planning before purchasing it in order to gage whether or not it would be worth my time, and all praised The Tools Techniques of Financial Planning:

The Tools Techniques of Financial Planning, 11th edition, is part of the popular Leimberg Library. It continues to provide complete coverage of the principles, processes, and practice of financial planning. This book is a must-have resource for any planner who desires a well-organized approach for explaining financial planning strategies to clients and is concerned with the suitability of the products offered. In addition to providing charts, checklists, and case studies, The Tools Techniques of Financial Planning features:

- One of the most comprehensive overviews of financial planning, from the introductory "What is Financial Planning?" to income tax, investment, retirement, charitable, and estate planning;
- The Tools Techniques format, which makes the book easy to use and comprehensive;
- Input from the developer of the book, Stephan Leimberg, a well-recognized authority in estate planning;
- Case studies to provide practical insight into handling specific real-world financial planning cases;

chapter on financial goals in the context of current lifestyle; Valuable information needed by all financial planners in understanding their role and providing added value to their clients

The Tools Techniques of Financial Planning has been fully updated to reflect state-of-the-art thinking in this critical subject area including:

- Planning techniques for clients with special needs and circumstances, such as aging and disability issues, elder care scenarios, and nontraditional relationships
- New chapter on comprehensive retirement income planning
- Updates on professional financial planning education and credentials, as well as financial services industry standards and regulations
- In-depth coverage of issues that can affect a client's financial goals, such as healthcare reform, long-term care planning, and tax law changes
- New chapter on serving cross-cultural clients introduces concepts such as cultural sensitivity, immigration and tax issues, and important financial planning techniques for clients from immigrant communities or U.S. nationals with financial interests abroad