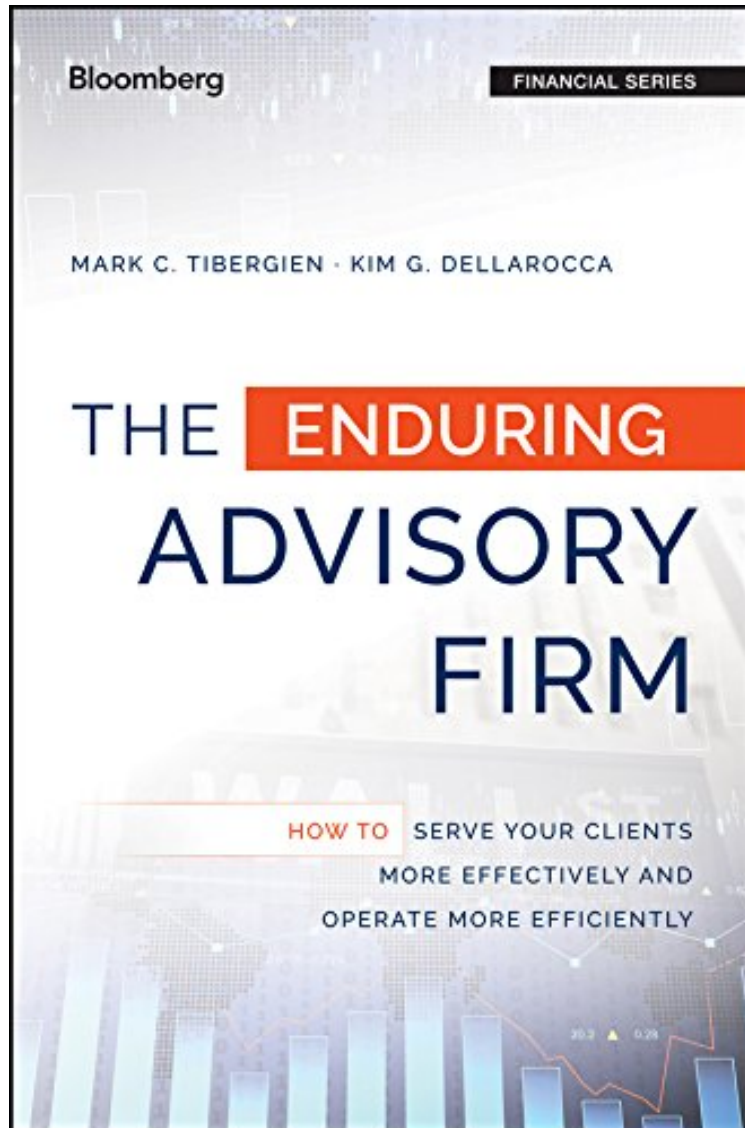


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## The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Financial)

Mark C. Tibergien, Kimberly G. Dellarocca  
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Mark C. Tibergien, Kimberly G. Dellarocca : The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Financial) before purchasing it in order to gage whether or not it would be worth my time, and all praised The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Financial):

0 of 0 people found the following review helpful. Perfect for any advisor whether you're 25 or 55By USCJeepLifeSo

I'm a fairly young advisor and have been in the business awhile now. I've read so many books on prospecting and framing and closing, you name it. Long story short, I've still had trouble getting through to prospects and some of my referrals have been skeptical as well. This book has honed in on generational biases and what you can do about it as well as little things I've overlooked or never thought of. As I was reading it, I took notes on things I wasn't doing, things I can do better, and things just to think about, which is something I encourage doing. In the months after reading it, I've noticed a huge change when interacting with clients and prospects since I've changed the way I approach them, handle meetings, and just focus on the little things this book suggests. I've read a whole bunch of books on how to be a better advisor, but this one tops them all. I've suggested it to a bunch of other advisors already 0 of 0 people found the following review helpful. Part 1 and Part 3 offered fantastic insight into anticipated future trends and practical steps for ...By CustomerBroken into 3 parts. Part 1 and Part 3 offered fantastic insight into anticipated future trends and practical steps for practice management. Part 2 focused on investors as a generation (Boomers, Millennials, etc.) and seemed a bit generic and boilerplate, though sprinkled with a few interesting factoids here and there. All in all, could have done with a lot more Parts 1 and 3 and less Part 2.

A guide for financial advisors who are ready to embrace new opportunities The Enduring Advisory Firm is a book for the forward-thinking financial advisor. Financial advisement is traditionally a hands-on field, so few in the industry feel threatened by the shifting social and technological landscape. In this book, Mark Tibergien and Kim Dellarocca make a compelling case for taking a closer look at technology and other big-deal industry trends in order to move the business of financial advice into the next stage of its evolution. Combining a facts-based approach with case studies and examples from the field, The Enduring Advisory Firm will ignite your imagination by demonstrating practical strategies for attracting clients and streamlining operations. Today's smart practice managers are focusing on emerging topics like the needs and expectations of the Millennial generation, mobile and interactive technologies, and growth planning. Responding thoughtfully to these trends, with the help of this book, could propel your financial advising business toward a more successful future. In-depth discussion of trends and forces that you can harness to reshape your financial advisement business Case studies and examples showing how to navigate the most difficult business decisions Innovative ideas for process improvement, more fruitful client interactions, and sustainable growth Tips and insight for attracting Millennial clients and talent by leveraging new technologies The Enduring Advisory Firm will inspire financial advisors, managers, and executives to branch out in ways that will lead to measurable growth. With a newfound focus on the evolution of your business, you might be surprised at where change takes you.

From the Inside Flap The largest risk to the financial advisory industry isn't percolating in Silicon Valley; it's the false confidence financial advisors, managers, and executives have in the sustainable success of their current business models. Today's world looks a lot different than it did when many firms formed, and failure to retool your advisory services to the new generations of clients and the technologies they use could mean the end of your business. The Enduring Advisory Firm provides detailed guidance for making the strategic adjustments to attract more clients, produce organic growth, and operate with state-of-the-art efficiency. The combined expertise of this book's remarkable authorial team shines through on every page as they lay out a road map of tangible actions to take in order to ensure your financial advisory firm stands out from the competition and achieves its unique goals for success. First, it demystifies the most common assumptions about the business of financial advice and why they won't continue to hold true in the future. Then, it enables you to develop a strategic plan for growth by defining your ideal client and organizing your firm to provide an optimal experience. The authors share their firsthand insights and extensive research to create in-depth profiles on the major types of clients seeking financial advice so you can better customize your approach to reach them in meaningful ways, anticipate their habits and preferences, and exceed their expectations. This practical tool enables you to: Gain research-based perspective on mature clients, Baby Boomers, Generations X and Z, and Millennials, as well as the more active and independent female investor Get close to the best practices top advisory firms use to distinguish themselves, establish a positive, mission-driven culture, and create leadership vision and guiding principles Use proven tactics to attract and retain the most promising new talent Don't let your business stall; evolve it with The Enduring Advisory Firm. From the Back Cover PRAISE FOR THE ENDURING ADVISORY FIRM "Mark and Kim present a fresh, and refreshing, look at the business of financial advice. Deeply researched and with one of the finest analyses of demographic and gender dimensions, The Enduring Advisory Firm provides a uniquely practical guide at a critical juncture of increasing demand and shrinking (and aging) supply. With characteristic iconoclasm and a healthy dose of contrarian thinking, this book is smart and entertaining. It's a great read and very important too." —Tim Kochis, JD, MBA, CFPreg., CEO, Kochis Global; former CEO and Chair, Aspiriant "If your goal is to grow your advisory firm; buy this book, read it, highlight it, and then read it again. Mark Tibergien's expertise has proven invaluable to our firm, and his knowledge is communicated in these pages. Mark and Kim have great vision for where the business is going and how to stay ahead in the ever-changing world of wealth management." —Brittain Prigge, Partner, Head of Relationship

Management, Balentine "As I read *The Enduring Advisory Firm*, I found myself taking notes on critical information to share with our leadership team. This is a must-read book if you are passionate about growing a successful and profitable advisory business. Mark and Kim know the business and the challenges we face and, most importantly, how to tackle the big issues." —Greg Sullivan, President and CEO, Sullivan, Bruyette, Speros Blayney, LLC

**About the Author**  
**MARK C. TIBERGIEN** is CEO of Pershing Advisor Solutions, a BNY Mellon company. A regular columnist for *Investment Advisor* magazine, he is the author of *Practice Made Perfect*, *How to Value, Buy, or Sell a Financial Advisory Practice*, and *Practice Made (More) Perfect*. **KIM G. DELLAROCCA** is managing director, BNY Mellon. In addition to her global marketing leadership role, Kim directs one of the industry's most expansive thought leadership programs and has overseen the publishing of more than 125 studies and papers on the critical topics facing financial services firms today. Kim is invited to speak internationally and her views have been quoted more than 100 times in industry and mainstream publications, including *The New York Times*, *Bloomberg*, *The Financial Times*, *Wall Street Journal*, and *USA Today*.