



# **How to Open & Operate a Financially Successful Personal Financial Planning Business: With Companion CD-ROM (How to Open and Operate a Financially Successful...)**

*Kristie Lorette, Peg Stomierowski, Martha Maeda*

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Millions of Americans every year have troubles with their finances. They turn to experts in droves, asking for help in filing their taxes, consolidating their debt, or just planning how they will pay their bills and invest their retirement funds. For anyone looking to become a financial planner, there is a huge amount of room open to step into the industry and start providing your expertise and services to individuals across the board of American finances. This book was written for anyone who has ever wanted to dip their foot into financial planning but did not know where to start. Through hours of meticulous research, the author has compiled countless resources for potential planners that will guarantee a successful start for your new business. You will learn the fundamental basics of financial planning, starting with the very process that most planners use to organize their own finances. You will learn how to organize financial statements and to create plans and how to properly manage taxes to great effect. You will learn how to manage basic assets such as cash, savings, home equity, and automobiles. You will learn how to effectively manage credit and how to deal with insurance including life insurance, health insurance, and property insurance. Whether you will be operating out of your home or you are looking to buy or rent office space, this book can help you with a wealth of start-up information, from how to form and name your business to deciding if this will be a joint venture or if you would rather work solo. Valuable information on forming a Partnership, LLC, Corporation, or becoming a Sole Proprietor, the four types of business formations, is included, and also the legal implications of each. This complete manual will arm you with everything you need, including sample business forms; contracts; worksheets and checklists for planning, opening, and running day-to-day operations; lists; plans and layouts; and dozens of other valuable, timesaving tools of the trade that no business owner should be without. While providing detailed instruction and examples, the author leads you through every detail that will bring success. You will learn how to draw up a winning business plan (the companion CD-ROM has the actual business plan you can use in Microsoft Word™) and about basic cost control systems, copyright and trademark issues, branding, management, legal concerns, sales and marketing techniques, and pricing formulas. You will learn how to hire and keep a qualified professional staff, meet IRS requirements, manage and train employees, generate high profile public relations and publicity, and implement low cost internal marketing ideas. You will learn how to build your business by using low and no cost ways to satisfy customers, and also ways to increase sales, have customers refer others to you, and thousands of excellent tips and useful guidelines. Expert financial planners have been interviewed for this book and their hundreds of hours of interviews have been included to provide you a complete overview of everything you need to know about investments in stocks, bonds, securities, and mutual funds and the vital prospect of retirement investment. Throughout the book, you will learn what codes of ethics are involved in dealing with someone else's finances and how you can effectively prepare for the necessary steps you will need to take before you set one eye on your first client's statements. For all prospective financial planners, this guide will give you a complete walkthrough and timeline of what you need to accomplish to be effective.

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