



Questions Great Financial Advisors Ask... and Investors Need to Know

By Alan Parisse, David Richman

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A financial advisor recounts an interview with a recently retired physician who planned an enjoyable—and costly—retirement. The doctor wanted his entire portfolio in bonds, which was far too conservative to maintain the lifestyle he and his wife had planned. In the advisor's words:

"This fellow was a bit of a know-it-all, and I wasn't getting through. Finally I asked him, 'Doctor, how will it feel for you when you have to go back to work?' That got his attention, and I was able to lay out a strategy that would allow him to retire and stay retired."

In *Questions Great Financial Advisors Ask...and Investors Need to Know*, coauthors Alan Parisse and David Richman have compiled the questions great advisors ask that lead to the probing and personal conversations necessary to diagnose and understand clients'—and potential clients'—deep-seated feelings about money. That's how great advisors help clients wring the emotion out of investing and set them on the rational road to achieving their financial goals.

Throughout this book are questions, suggestions, and stories from some of the world's top financial advisors, including a chapter of "great questions to ask" organized by topic.

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Editorial Review

About the Author

Alan Parisse During his twenty year career in the investment business, Alan Parisse gained extensive experience in both the investment banking and distribution and sales sides of the business. Over the last decade he has become a renowned speaker and commentator on dealing with change and turbulent times. In December of 1999, Successful Meetings Magazine named him one of the "Top 21 Speakers for the 21st Century". He is also the only person to come out of the investment business to be inducted into the National Speaker's Association Hall of Fame. Alan received his BS from SUNY Buffalo and his MBA from the University of Arizona. He resides in Boulder, Colorado.

David Richman has been in the investment business for over twenty years. He has extensive experience in marketing and sales and has been a senior member of the sales team for the oldest independent provider of managed money consulting services in the country. He is a friend and partner to scores of financial advisors who have leveraged his skills through thousands of seminars and joint calls with affluent investors. David is a member of the Connecticut Bar and has sat on numerous civic boards over his career. He holds a BA and MA from the University of Rochester and a JD from the University of Connecticut. David resides in Connecticut with his spouse of 26 years and their children.

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Eleonora Plunkett:

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