



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

By Alan Parisse, David Richman

[Download now](#)

[Read Online](#) 

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman

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.

 [Download Questions Great Financial Advisors Ask... and Inve ...pdf](#)

 [Read Online Questions Great Financial Advisors Ask... and In ...pdf](#)

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

By Alan Parisse, David Richman

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman

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.

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman Bibliography

- Sales Rank: #25984 in Books
- Brand: Parisse, Alan/ Richman, David
- Published on: 2006-06-01
- Released on: 2006-06-01
- Original language: English
- Number of items: 1
- Dimensions: 9.00" h x .70" w x 6.00" l, .82 pounds
- Binding: Hardcover
- 184 pages



[Download Questions Great Financial Advisors Ask... and Inve ...pdf](#)



[Read Online Questions Great Financial Advisors Ask... and In ...pdf](#)

Download and Read Free Online Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman

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.

Users Review

From reader reviews:

Eleonora Plunkett:

Reading a guide tends to be new life style in this particular era globalization. With reading you can get a lot of information that may give you benefit in your life. Having book everyone in this world could share their idea. Ebooks can also inspire a lot of people. Lots of author can inspire all their reader with their story or even their experience. Not only the storyline that share in the guides. But also they write about the information about something that you need illustration. How to get the good score toefl, or how to teach your sons or daughters, there are many kinds of book that exist now. The authors in this world always try to improve their talent in writing, they also doing some analysis before they write on their book. One of them is this Questions Great Financial Advisors Ask... and Investors Need to Know.

Mildred Patton:

Typically the book Questions Great Financial Advisors Ask... and Investors Need to Know has a lot associated with on it. So when you make sure to read this book you can get a lot of gain. The book was published by the very famous author. The author makes some research prior to write this book. This kind of book very easy to read you can obtain the point easily after reading this article book.

Jaclyn Utecht:

Can you one of the book lovers? If so, do you ever feeling doubt if you are in the book store? Try to pick one book that you just dont know the inside because don't evaluate book by its handle may doesn't work the following is difficult job because you are afraid that the inside maybe not since fantastic as in the outside seem likes. Maybe you answer could be Questions Great Financial Advisors Ask... and Investors Need to Know why because the fantastic cover that make you consider concerning the content will not disappoint an individual. The inside or content will be fantastic as the outside or maybe cover. Your reading sixth sense will directly direct you to pick up this book.

Barbara Wheat:

As we know that book is significant thing to add our information for everything. By a publication we can know everything we really wish for. A book is a range of written, printed, illustrated or maybe blank sheet. Every year was exactly added. This e-book Questions Great Financial Advisors Ask... and Investors Need to Know was filled regarding science. Spend your spare time to add your knowledge about your research competence. Some people has several feel when they reading a book. If you know how big benefit of a book, you can really feel enjoy to read a reserve. In the modern era like currently, many ways to get book which you wanted.

Download and Read Online Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman #6CG3HIYFZ0M

Read Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman for online ebook

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman
Free PDF d0wnl0ad, audio books, books to read, good books to read, cheap books, good books, online books, books online, book reviews epub, read books online, books to read online, online library, greatbooks to read, PDF best books to read, top books to read Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman books to read online.

Online Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman ebook PDF download

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman Doc

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman MobiPocket

Questions Great Financial Advisors Ask... and Investors Need to Know By Alan Parisse, David Richman EPub