

Tools & Techniques of Financial Planning (Tools and Techniques of Financial Planning)



[Tools & Techniques of Financial Planning \(Tools and Techniques of Financial Planning\) 下载链接1](#)

著者:Stephan R. Leimberg

出版者:National Underwriter Company

出版时间:2009-09-30

装帧:Paperback

isbn:9780872189898

In today's constantly changing marketplace, stay up-to-date on the latest products, tax laws and regulations, and best practices with the 9th Edition of Tools & Techniques of Financial Planning. Delivering the most current and essential strategies, this latest edition is ideal for all students and professionals who must master the fundamentals of financial planning.

Steps and tools in the financial planning process as well as in-depth reviews of the various strategies in today's market with emphasis on cash-flow management within personal financial planning, and expanded discussions on special needs trusts, privacy and identity theft protections, reverse mortgages, and finding strategies for education planning.

New 9th Edition offers coverage on:

The impact of the market downturn and uncertain economic times on financial planning and how it has changed.

Discussion of deductible losses from Traditional and Roth IRAs, Section 529 Plans, and ESAs.

Tax-favored funding provisions, grants, loans, expected family contributions, and other college amounts updated.

Quick overview of popular trusts, such as grantor trusts, charitable trusts, and marital/bypass trusts.

Implications of transfers of property between spouses related to divorce, and discussion of what is regarded as marital for divorce purposes.

Ideal for:

Financial Planners, Advisors, Bankers, Stockbrokers, Accountants, Attorneys, Financial Planning Instructors and

Students, Law Offices, CPA firms, Insurance Agents, Para-professionals

作者介绍:

目录:

[Tools & Techniques of Financial Planning \(Tools and Techniques of Financial Planning\) 下载链接1](#)

标签

planning

financial

评论

[Tools & Techniques of Financial Planning \(Tools and Techniques of Financial Planning\)_下载链接1](#)

书评

[Tools & Techniques of Financial Planning \(Tools and Techniques of Financial Planning\)_下载链接1](#)