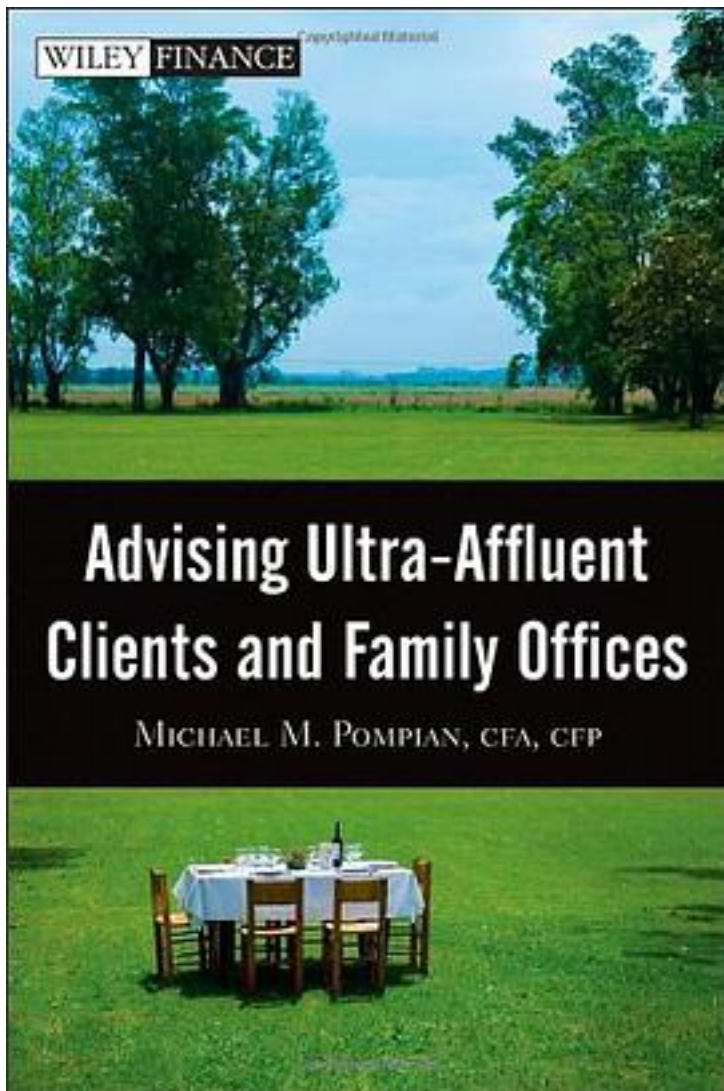


# Advising Ultra-Affluent Clients and Family Offices



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出版者:

出版时间:2009-5

装帧:

isbn:9780470282311

Praise for Advising Ultra-Affluent Clients and Family Offices "Michael Pompian's book Advising Ultra-Affluent Clients and Family Offices is noteworthy for its comprehensiveness. Michael combines 'the big picture' with detailed, prescriptive, and actionable strategies; advisers to wealthy families will receive a detailed understanding of how a quickly evolving landscape impacts their business and its implications for their clients." -John Benevides, President, Family Office Exchange "This book should be on the reading list of anyone who wants to be a full-fledged professional in our industry. Michael Pompian has wisely chosen to focus on practical descriptions and recommendations; in my view this is a great plus, as we need more educational resources in this field. Congratulations. The book is well worth reading." -Jean L.P. Brunel, CFA, Managing Principal, Brunel Associates, LLC "Ultra-affluent clients want information and advice integrated and in real time. So planning, investing, and measuring become a continuous process. This is very hard to do. Michael Pompian articulates a clear and insightful road map which outlines the process, components, and human factors needed to create a sustainable world-class wealth management program-both advisers and wealth owners would be wise to follow Michael's lead." -Stephen Martiros, founder, Summitas (www.summitas.com) Managing Partner, CCC Alliance (www.cccalliance.com) "As wealthy families become more globalized, their needs for wealth preservation and growth have become more complex and sophisticated in times of financial uncertainty. Michael Pompian has crafted an insightful and comprehensive guide for enhancing your own capabilities and awareness on how to advise the most demanding clients. A must-read for all financial advisers!" -Dr. Kurt Moosmann, MBA TEP CFP; cofounder and Managing Partner of Dara Capital Ltd., Zurich, Switzerland "Without incorporating the critical components of effective family governance and the awareness of generational and behavioral issues, families of wealth and their advisers are operating blind in their wealth management pursuits. Michael Pompian's book gives both advisers and family members essential insights for discovering the risk factors they must consider in today's environment and in finding the resources required to provide consummate solutions." -Lisa Gray, graymatter Strategies LLC, author of The New Family Office and Generational Wealth Management "Advising Ultra-Affluent Clients and Family Offices is a valuable 'handbook' that covers all the major areas of wealth management. While Mr. Pompian has written the book primarily for wealth advisers, Advising Ultra-Affluent Clients and Family Offices will provide invaluable insights to ultra-affluent individuals and families, particularly those who are thinking about setting up a family office or becoming clients of a multifamily office." -Paul R. Perez, CFA, Managing Director, Family Advisory Services, Northern Trust "I like the way Michael Pompian presents this material. It covers the waterfront with a clear, concise, and compelling treatment. This book will prove useful for family members and family office executives. I especially admire the multigenerational orientation." -Bradley G. Fisher, CEO, Springcreek Advisors LLC (Multi-Family Office), Corte Madera, California

作者介绍:

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