



Deena Katz's Tools and Templates for Your Practice: For Financial Advisors, Planners, and Wealth Managers

Deena B Katz, Deena B. Katz

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Following on the heels of the author's immensely popular book, *Deena Katz on Practice Management*, this nuts-and-bolts resource illustrates its predecessor's time-saving concepts. *Deena Katz's Tools and Templates for Your Practice* elaborates on the first book's concepts by providing and explaining how to use the actual check sheets, forms, and procedures developed by top wealth managers and planners. It offers financial planners and advisers dozens of shortcuts to running an efficient, thriving practice. Whether financial planners have been in business for ten days or ten years, they will benefit from this book's commonsense, pragmatic approach to running a successful advisory practice.

The book is organized around the natural cycle of finding, developing, and keeping clients. It includes a free CD-ROM containing all the Microsoft Office forms and spreadsheets in the book, usable on both PC and Macintosh platforms. Readers can customize these valuable tools to build a solid administrative structure for their businesses. Many of the book's documents will be maintained and updated on the Web, to help financial planners stay abreast of leading-edge thinking in practice management.

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