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Journal of Wealth

Management Spring

2018 issue (requires

subscription) Forbes

interview 1/17/18.

Wall Street Journal

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Financial Planning

oped "Alexa, Can You

Be My Financial

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Wealth Management

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With "Wealth

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Unwrapped" Ms.

Beyer has

constructed a critical

tool that empowers

individuals to

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Understand the responsibility of managing wealth.

Starting with a curriculum of sorts, Ms. Beyer causes the reader to closely examine their own role in the process and what they should reasonably expect from a potential advisor.

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Charlotte B ...

The revised and updated Wealth Management Unwrapped provides an insider's view of how to kick the tires and become a more educated consumer of wealth management services before you become a client.

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Charlotte Beyer is a much-respected pioneer in the industry, and adds valuable and deceptively simple insights in her new sections for women, parents and older investors, and the discussion of robo-advisors.

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Unwrapped, Revised
and Expanded:
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The revised and
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Unwrapped provides
an insider's view of
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educated consumer of
wealth management
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Once you finish
reading Wealth
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Unwrapped, not only
will you be armed with
answers to many
questions – you'll also
know which questions
to ask those who
advise you on your
wealth. Your reward?

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You can truly begin to enjoy the present! So let's begin with our discovery by asking an age-old question! Is the customer always right?

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Beyer's extensive knowledge and

experience observing high-net-worth

investors and family offices. She strips

away industry jargon, and empowers

readers to find and build partnerships

with the right financial advisors.

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What You Need to
Know ...

Her 2017 book,
Wealth Management
Unwrapped Revised
and Expanded, is a
most original addition
to the industry's body
of knowledge. Instead
of prescribing a one-
size-fits-none
solution, Beyer ...

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Charlotte Beyer -
Author - Wealth

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Unwrapped ...

Charlotte B. Beyer is the author of Wealth Management Unwrapped and founder of the Institute for Private Investors in New York City.

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Wealth Management
Unwrapped is the
accumulation of
Beyer's extensive
knowledge and
experience observing
high-net-worth
investors and family
offices. She strips
away industry jargon,
and empowers
readers to find and

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build partnerships
with the right financial
advisors.

Wealth Management
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Charlotte B. Beyer
On the strength of its
timeliness and clarity,
Wealth Management
Unwrapped joins the
ranks of distinguished
writing on private
wealth. Although the

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book is intended primarily for people of means and family foundations, it should be mandatory reading for wealth advisers who seek to grow their businesses while developing trusted relationships with clients.

Wealth Management
Unwrapped: Unwrap

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What You Need to
Know ...

Wealth Management
Unwrapped provides
you with the tools and
tips you need to take
back control and more
effectively manage
your money. Wall
Street veteran
Charlotte Beyer
conducts a tour of the
wealth management
industry, guiding you

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through the complexities and jargon with straightforward, no-nonsense expertise.

Wealth Management Unwrapped, Revised and Expanded:
Unwrap ...

The revised and updated Wealth Management Unwrapped provides

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an insider's view of how to kick the tires and become a more educated consumer of wealth management services before you become a client.

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Management for women, parents and older investors, and the discussion of robo-advisors.

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With "Wealth
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constructed a critical tool that empowers individuals to understand the responsibility of managing wealth. Starting with a curriculum of sorts, Ms. Beyer causes the reader to closely examine their own role in the process and what they should reasonably expect

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from a potential
advisor.

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Management in the

New Economy Wealth

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management is a carefully practiced art and science, which not only helps understand the underlying concepts of wealth creation but also deals with efficient management of resources.

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Wealth Management
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what you need to
know to take charge
of your own wealth.

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high-net-worth investors and family offices. She strips away industry jargon, and empowers readers to find and build partnerships with the right financial advisors.

Wealth Management
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The purpose of the course is to provide students with a fundamental understanding of the business and practice of wealth management. Topics will include an overview of asset management, equity portfolios, stock selection, valuation metrics, mutual funds,

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ETFs, outside managers, asset allocation, income needs, and illiquid investments.

Practice of Wealth Management for High-Net-Worth Clients ...
Wealth Management Unwrapped
condenses years of thinking into precious pages of readable

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and immensely useful chapters. On the strength of its timeliness and clarity, *Wealth Management Unwrapped* joins the ranks of distinguished writing on private wealth. Beyer adopts both the client's perspective and the adviser's perspective.

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