



# Getting Started in Financial Consulting (Getting Started In.....)

*Edward J. Stone*

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**Getting Started in Financial Consulting (Getting Started In.....)** Edward J. Stone

Comprehensive Coverage

Completely Up-to-date!

A detailed road map for getting started as an independent financial consultant

Each year, thousands of people from all walks of life leave the security of their nine-to-five jobs to pursue careers as independent financial consultants. For a great many of them, the experience is financially and personally rewarding beyond their expectations. If you, too, are thinking about taking the big leap into becoming a financial consultant, but you aren't sure how to go about it, this book is for you.

How can I be sure that financial consulting is right for my personality? What kinds of training and skills do I need to succeed, and how do I get them? What special licenses or certification are required? How do I find clients and build lasting relationships with them? With the help of first-person accounts from successful financial consultants from across the country, expert Edward J. Stone provides complete answers to these and all your questions concerning:

- \* Acquiring and honing key skills, including the all-important "people" skills
- \* Organizing and structuring your business
- \* Indispensable software tools
- \* Services you can offer clients and why you should specialize
- \* Marketing your services, targeting clients, and building a solid core clientele
- \* Why you should become certified and how to go about it
- \* Profiling clients and drawing up formal financial plans
- \* Dealing with state and federal regulations
- \* Contracts and key legal considerations
- \* Surviving in a down market

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