

Contents

Foreword		ix
Acknowledgments		xv
Preface		xvii
	PART I INDUSTRY RESOLUTIONS	1
Chapter 1	If These Walls Could Talk	3
Chapter 2	Speedometers and Odometers	13
Chapter 3	The Warring Hand	21
Chapter 4	I'm a Numbers Guy	29
Chapter 5	A New Level of Integrity Beyond Disclosure	39
Chapter 6	A New Value Proposition	49
Chapter 7	A New Standard for Practice: Practicing World-Class Wealth Care	59
Chapter 8	The New Frontier: Getting to the Right Side of the Advisory Business	69

	PART II LIFE RESOLUTIONS	81
Chapter 9	Permanent Reference Points: How the Financial Blueprint Is Formed	83
Chapter 10	How We Measure Money	91
Chapter 11	Spinning Out of Control	101
Chapter 12	Protecting Your Clients from <i>Half</i> fluence	111
Chapter 13	The End of Retirement as We Know It	121
Chapter 14	What Do Your Clients Want Their Money to Do?	133
	PART III DIALOGUE RESOLUTIONS	143
Chapter 15	The History Dialogue: Finding Your Clients' Future in Their Past	145
Chapter 16	Goals Are Overrated	155
Chapter 17	Funding "Single Moments"	163
Chapter 18	The Parental Pension	171
Chapter 19	By the Side of the Road: Dealing with the Big "What If . . ."	179
Chapter 20	A 100 Percent Certainty	189
Chapter 21	The New Venture Philanthropy Dialogue	197
	Bibliography	207
	Index	211