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 Halffluence  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