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Implementing the Wealth Management Index: Tools to Build Your Practice and Measure Client Success

Ross Levin

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The gold standard for measuring financial progress, updated for today's market

From Ross Levin, a trusted financial planner, comes *Implementing the Wealth Management Index*. The new edition of the book *Investment Advisor* called a "landmark opus," this revised and updated volume expands upon his legendary Wealth Management Index tool. A benchmark system that, through a series of questions and evaluations, enables advisors to score their performance for individual clients, the tool is used by firms around the world. In this new edition, the index looks at asset protection, disability and income protection, debt management, investment planning, and estate planning.

The new edition adds more how-to information, as well as actual client examples and case studies to show how Levin's firm successfully uses the index as a daily strategy.

- Asks the important questions, like "Did you use all reasonable means to reduce your taxes?" and "Have you established and funded all the necessary trusts? Have you made your desired gifts for this year?
- Newly revised and expanded for the first time since 1997

Essential guidance from a top man in the game, *Implementing the Wealth Management Index* is the one-stop resource for measuring client financial progress.

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