



Financial Planner's Library on CD-ROM **[Third edition]**

The financial planner is a like juggler, trying to keep a variety of balls simultaneously in the air. Each aspect of practice becomes critical, just as action is needed.

Some of the activities of operating a successful financial planning practice generally attract more attention than others, such as marketing and advertising, closing engagements, and office administration. Because product review, selection and implementation are often related to advisor compensation, they attract a great deal of the financial juggler's concentration.

The heart of financial planning, advice, often receives little attention. Not because it is unimportant, it just doesn't seem immediately and predictably urgent. That ball does not seem to be dropping so rapidly. However, retaining clients and receiving referrals from other professionals is very dependent on the quality of the advice delivered. And, the first line of protection from practitioner liability exposure is to not deliver incorrect or incomplete advice.

But, where does the advisor turn for ideas and organized research?

There are many sources. Perhaps there was treatment of a critical topic at a prior conference; but, which one? Were the ideas in the presentation, or the handout? Where is the workbook, white paper or cassette? And, how can the professional advisor instantly search, retrieve, review and use the knowledge of experts?

That's what the ***Financial Planner's Library on CD-ROM*** – by Dr. David Edward Marcinko MBA - is all about.

It represents the collected wisdom of 40 noted experts, in 30 chapters. Their vast experience, research and application techniques are assembled for quick access and easy use.

Find the references you need from among 3,000 pages almost instantly. Read the well-written discourse. Discard what is not applicable. Copy and retain that which is helpful, and paste it right into your analysis. There is nothing as valuable as a tool that is handy and right for the job. The mechanic who left a critical tool back in the shop can't fix a car on the road.

Likewise the financial planner that suddenly recognizes the need for expert opinion to suggest an idea or confirm a suspicion cannot suddenly order the tool required, ***Financial Planner's Library on CD-ROM***. It must be at hand, installed in your computer and tested. Every tool requires a bit of experience to be used effectively.

The best time to learn is not under the urgency of a plan to be delivered to the client within a few hours. The planner needs to reach into the toolbox, grasp the proper instrument, apply it correctly and voila – the problem is solved!

Now that you have acquired a very powerful toolbox, you need to take a few moments while you are not under pressure, to learn how to use it. This will be most valuable for your business:

- You'll be amazed at the learning you will be able to acquire by leisurely reading those sections most relevant to your practice; and also wander intellectually in the fields you've never explored, but would like to know more about.
- You'll know how to perform searches to instantly find the documents you need, and how to read and extract this information when it is required.

It only makes sense to practice with your new ***Financial Planner's Library with CD-ROM***. If you are a prior user, quickly review the new features that have been added, and check out the revised and more efficient procedures.

By acquiring the ***Financial Planner's Library on CD-ROM***, you have equipped yourself with an entire box of very effective tools. With only 10 to 15 minutes of practice you will know how to use it efficiently. Then, just when you suddenly need the resources of great minds and endless experience – here it is at the click of your mouse!

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