



# **Deena Katz's Complete Guide to Practice Management: Tips, Tools, and Templates for the Financial Adviser (Bloomberg Financial)**

*Deena B. Katz*

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# Deena Katz's Complete Guide to Practice Management: Tips, Tools, and Templates for the Financial Adviser (Bloomberg Financial)

Deena B. Katz

## Deena Katz's Complete Guide to Practice Management: Tips, Tools, and Templates for the Financial Adviser (Bloomberg Financial) Deena B. Katz

Deena B. Katz, CFP, a preeminent authority on practice management and an internationally recognized financial adviser, presents a comprehensive guide to running a professional financial planning practice.

To create this book, Katz updated, revised, and combined her two acclaimed books *Deena Katz on Practice Management* (1999) and *Deena Katz's Tools and Templates for Your Practice* (2001).

In this newly expanded volume, she presents the essentials on how to help a practice thrive side by side with the tools and templates needed for the everyday operation of your firm.

This new volume offers guidance on practice-management issues:

- setting up an office
- systems and technology
- administration and staffing
- marketing
- growing as the market changes
- hanging on to clients for the long term
- succession planning when the time comes

This comprehensive resource provides sample forms, worksheets, templates, letters, brochures, and collateral materials developed and refined by top wealth managers and planners.

From keeping the business running well by designing dynamic collateral material, to considering plans for retirement, Deena B. Katz guides advisers through every challenge a financial planning business will face.

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