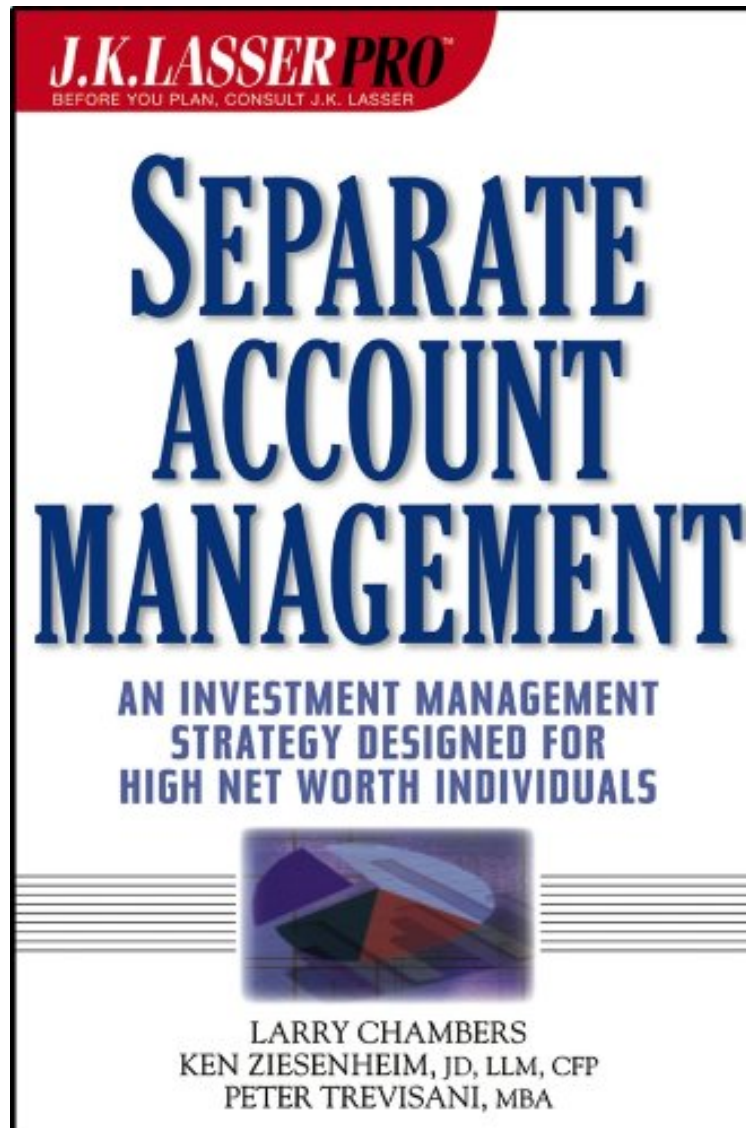


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Larry Chambers, Ken Ziesenheim, Peter Trevisani

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A FINANCIAL ADVISOR'S GUIDE TO A PERSONAL AND FLEXIBLE MONEY MANAGEMENT APPROACH FOR HIGH NET WORTH CLIENTS Twenty years ago separate account management programs (SAMs) were reserved for the sophisticated advisor who only served the very wealthy. Today, SAM programs have become available to most advisors and several layers of the affluent. If you intend to work with affluent clients that demand personal and flexible service, you must have a complete understanding of this approach to money management—and J.K. Lasser Pro Separate Account Management is the perfect guide. Filled with in-depth insights and expert advice, J.K. Lasser Pro Separate Account Management will introduce you to the nuances of separate account management as well as show you how to use this investment vehicle to build your business and help your clients reach their financial goals. This invaluable resource will: * Take the mystery out of providing professional asset management services to a broad cross section of your clients * Educate you about the opportunities and advantages of using separately managed accounts * Provide you with information about how separately managed accounts work as well as who should be in them * Illustrate how you can employ separately managed accounts in your financial advisory practice * Learn how to convert from commission to fees * And much more Filled with practical guidance and vital information, J.K. Lasser Pro Separate Account Management is a valuable road map for financial professionals looking to master this unique approach to managing money.

From the Inside Flap After decades of being dismissed as a serious contender in the investment arena, separately managed accounts—also known as individually managed accounts or managed accounts—have finally come into their own. Today, separately managed accounts are making a serious bid to become the core investment for high net worth individual investors, controlling more than \$40 trillion in investment assets. Now more than ever, understanding this approach to money management is critical, if you intend to work with affluent clients that demand personal and flexible service. Whether you're a financial professional with no previous money management experience or an advisor who has been practicing for years, J.K. Lasser Pro Separate Account Management has the information you need to firmly grasp a proven investment management strategy designed for high net worth individuals. Filled with in-depth insights and expert advice, this comprehensive guide will introduce you to the nuances of separate account management and show you how to use this investment vehicle to build your business as well as help your clients reach their financial goals. Composed of three equally informative parts, this invaluable resource provides the most well-rounded discussion of separately managed accounts available today. Part I lays a solid foundation, by explaining the basics of separate account management—from relevant definitions and the state of the industry to the current market for separately managed accounts Part II details the most overlooked aspect of separate account management—financial planning. You'll learn how to use taxes to your advantage, set investment objectives, write an Investment Policy Statement, and much more Part III will show you how to convert your existing clients to separate accounts, transform your practice into a separate account fee business, market your services to high net worth individuals, as well as use credibility marketing to build pathways back to your business Separately managed accounts provide investors with certain unique capabilities to grow capital, namely: the ability to customize portfolios with individual securities, better manage tax liabilities, and control and manage cash flows. J.K. Lasser Pro Separate Account Management will help financial professionals master the unique aspects of this investment vehicle and enable you to sit down with your clients and recommend a separate account program with confidence and knowledge.

From the Back Cover **A FINANCIAL ADVISOR'S GUIDE TO A PERSONAL AND FLEXIBLE MONEY MANAGEMENT APPROACH FOR HIGH NET WORTH CLIENTS** Twenty years ago separate account management programs (SAMs) were reserved for the sophisticated advisor who only served the very wealthy. Today, SAM programs have become available to most advisors and several layers of the affluent. If you intend to work with affluent clients that demand personal and flexible service, you must have a complete understanding of this approach to money management—and J.K. Lasser Pro Separate Account Management is the perfect guide. Filled with in-depth insights and expert advice, J.K. Lasser Pro Separate Account Management will introduce you to the nuances of separate account management as well as show you how to use this investment vehicle to build your business and help your clients reach their financial goals. This invaluable resource will: Take the mystery out of providing professional asset management services to a broad cross section of your clients Educate you about the opportunities and advantages of using separately managed accounts Provide you with information about how separately managed accounts work as well as who should be in them Illustrate how you can employ separately managed accounts in your financial advisory practice Learn how to convert from commission to fees And much more Filled with practical guidance and vital information, J.K. Lasser Pro Separate Account Management is a valuable road map for financial professionals looking to master this unique approach to managing money.

About the Author **LARRY CHAMBERS** is President of Chambers and Associates, a financial-writing consulting firm. He is the author of thirty

books and 700 investment related articles. He was recently chosen as Business and Economics columnist for a three year period for Phi Kappa Phi Forum. The Forum is the quarterly magazine of the Phi Kappa Phi Honors Society, a community of scholars whose membership has grown to more than one million. KEN ZIESENHEIM, JD, LL.M., CFP, is President of Thornburg Securities and Managing Director of Thornburg Investment Management Company. Ken is currently serving as a Trustee for the National Endowment for Financial Education (NEFE) and as a member of the Ethics Committee for the FPA. He resides in Sebring, Florida. PETER TREVISANI, MBA, is Director of separate accounts at Thornburg Investment Management based in Santa Fe, New Mexico. Peter was CEO of Waybid Technologies and prior to that worked as a sales trader on the foreign exchange desk for Lehman Brothers, UK.