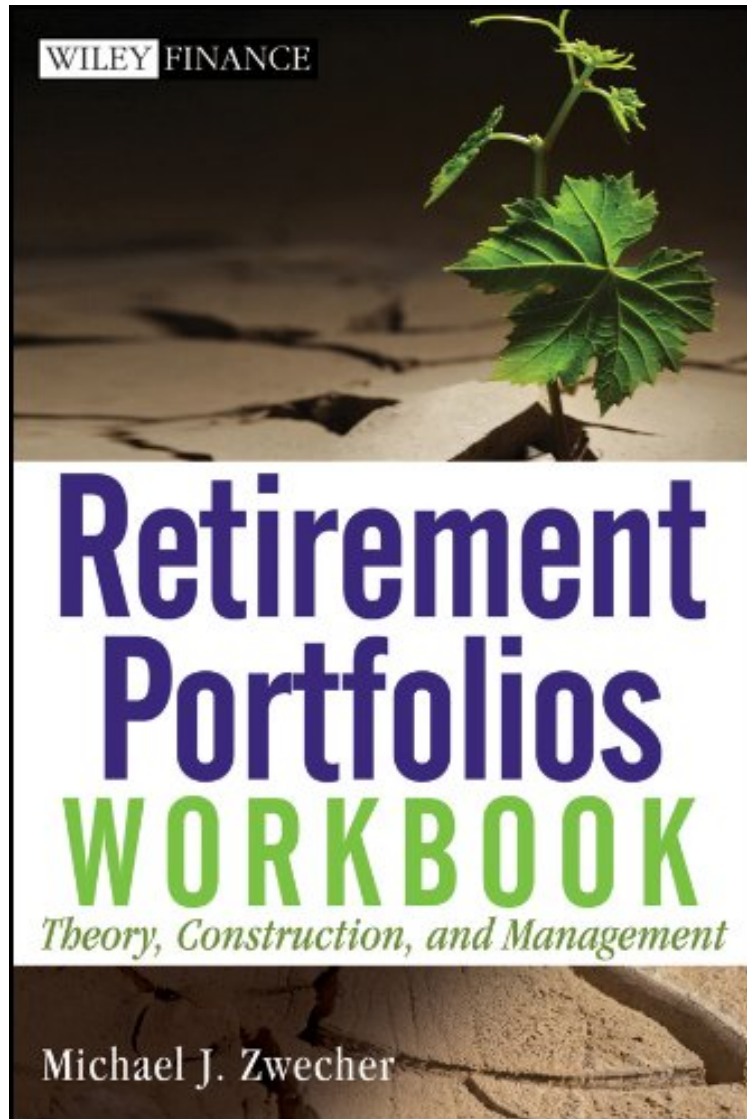


Retirement Portfolios Workbook: Theory, Construction, and Management (Wiley Finance)

Michael J. Zwecher

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Michael J. Zwecher : Retirement Portfolios Workbook: Theory, Construction, and Management (Wiley Finance) before purchasing it in order to gauge whether or not it would be worth my time, and all praised Retirement Portfolios Workbook: Theory, Construction, and Management (Wiley Finance):

1 of 1 people found the following review helpful. Book on RIIA's Essential Readings List By Francois G. Gadenne It is worth noting that this workbook and its companion book are on the Essential Readings list for the RMA designation [Retirement Management Analyst(sm)]. Mike Zwecher's books focus on one of three fundamental retirement

planning/flooring strategies identified in the RMA curriculum:- "Investment-based planning/flooring". The other two fundamental retirement planning/flooring strategies are:- "goals-based planning/flooring", and- "product-based planning/flooring". Because of the non-lobbying "View Across the Silos" perspective of the Retirement Income Industry Association (RIIA), this is a more-objective-than-most measure of relevance and value-added. The mission of the association includes:- the empirical validation of academic and industry solutions, processes and products,- the publication of solutions that pass the vetting process, and- the education of consumers and advisors about the proper use of these solutions. While the RMA Curriculum Book - The Retirement Management Analyst (RMA) Designation: Curriculum Book for RMA Candidates - is the required text to study for the RMA designation, consumers and advisors who want to build an Essential Readings library of their own will benefit from reading this book, especially if they place what they read in the context of the curriculum framework. To see the full Essential Readings list, check the website of the Retirement Income Industry Association (RIIA).

0 of 0 people found the following review helpful. Four Stars
By JeffH helps to reinforce the main book
5 of 12 people found the following review helpful. A Poor Choice
By denis jamison It was a major struggle to get through this text. The author's total concept of "flooring" as a way to build retirement portfolio was, in my opinion, contrived. The two paragraph summary sections at the end of each chapter seemed to say everything that needed to be said - it was just better said and better illustrated by other authors on the subject. This book isn't a worthwhile read for the practicing RIA and certainly not useful for the non-professional.

A companion Workbook to the text Retirement Portfolios Retirement is one of the most important parts of the financial planning process. Yet only two percent of financial advisors describe themselves as competent in retirement planning. Constructing a retirement portfolio is viewed as a difficult endeavor, and the demands facing financial advisors responsible for this task continue to grow. The pressures are particularly intense due to events such as the financial crisis and oncoming rush of retiring baby boomers. It is imperative that financial advisors be equipped and ready to create appropriate retirement portfolios. That's why Michael Zwecher-a leading expert on retirement income- has created Retirement Portfolios and the Retirement Portfolios Workbook. In the text Retirement Portfolios, leading retirement income expert Michael Zwecher provides financial professionals with complete coverage of the most important issues in this field. The Retirement Portfolios Workbook offers you a wealth of practical information and exercises that will solidify your understanding of the tools and techniques associated with this discipline. This comprehensive study guide Provides chapter summaries and end of chapter questions to the main book Test your knowledge of the information addressed in Retirement Portfolios, before you put it to work in real world situations Helps you learn to solve problems while setting up tools you can use in practice Puts the management of risks related to retirement portfolios in perspective If you want to gain a firm understanding of the information outlined in Retirement Portfolios, the lessons within this workbook can show you how.