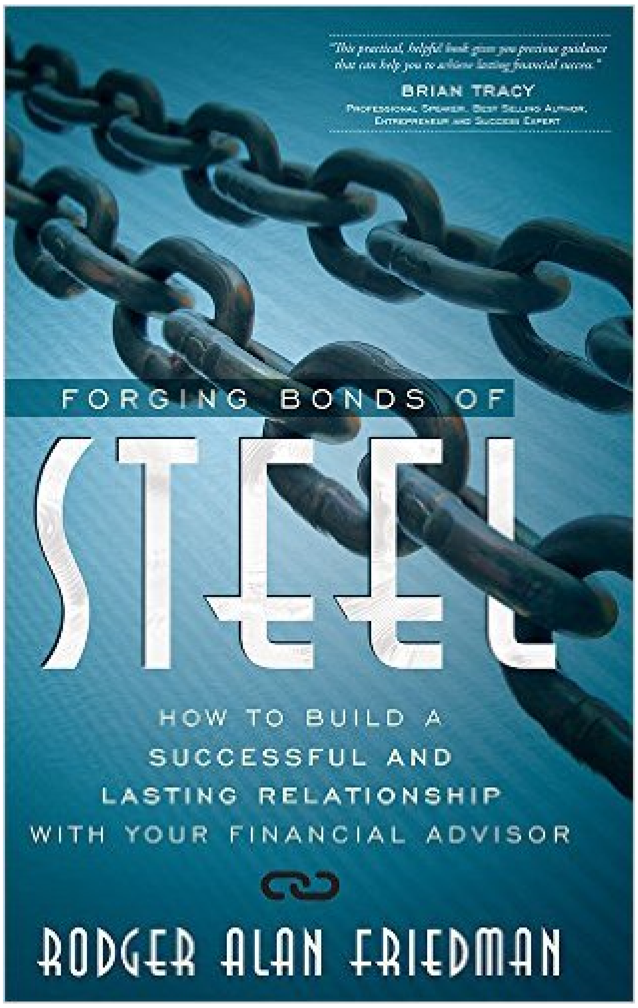
Forging Bonds Of Steel: How To Build A Successful And Lasting Relationship With Your Financial Advisor



Synopsis

As a wire-house advisor for 30 years, Rodger Friedman knows how to forge the relationships that are crucial to a successful retirement. A natural storyteller, Friedman recalls marveling at the massive steel chains that moored the cruise ships in New York Harbor when he was a boy. He likens those mighty links to the bonds between advisor and client. Forging Bonds of Steel explores how to form such a relationship that will serve your family for generations. Friedman knows what it takes to make a portfolio last for a lifetime and beyond, but first and foremost, he understands you need a financial advisor you can trust. Deep trust develops only over time, and it starts with getting to know each other. An advisorâ ™s first inquiry should be, â œTell me about your family.â • Friedmanâ ™s work ethic and sense of responsibility to others came from his own family. He grew up in New York City, and was the third generation working in his familyâ ™s laundry. It was there that he learned success comes through exemplary service and honesty. Rodger Friedman speaks from the heart. Every page is like a visit with an old friend who cares enough to tell it like it is. He shows you how to build the kind of rapport that will endure for years to come.

Book Information

Paperback: 194 pages

Publisher: Advantage Media Group (July 11, 2014)

Language: English

ISBN-10: 1599324784

ISBN-13: 978-1599324784

Product Dimensions: 5.5 x 0.4 x 8.5 inches

Shipping Weight: 8.8 ounces (View shipping rates and policies)

Average Customer Review: 4.9 out of 5 starsÂ Â See all reviewsÂ (20 customer reviews)

Best Sellers Rank: #1,539,719 in Books (See Top 100 in Books)   #282 inÂ Books > Business & Money > Finance > Wealth Management   #1361 inÂ Books > Business & Money > Personal Finance > Retirement Planning   #2092 inÂ Books > Textbooks > Business & Finance > Finance

Customer Reviews

The author offers us a well experienced list of qualifying questions to be asked from both sides of the financial advisory interview table. While it is quite laymen in its narrative, do not discount the importance of being reminded of basic questions to review while interviewing investment relationships. At its heart, this book is primarily about establishing the necessary baseline for lengthy relationships.

This terrific book should be read by every young financial adviser! As an attorney and Certified Financial Planner, I have been advising the owners of closely-held businesses for more than thirty years. It took me at least the first decade to learn what Rodger Friedman so enjoyably shares. Although I'm sure that clients can benefit from his advice, its real audience should be financial advisers, and, indeed, any professional who needs to gain and merit the trust of his clients. Like Rodger, I am working now with the third generation of some of my original clients' families. I know that the secrets that he shares are the golden key to succeeding in any profession where relationships are built on trust. I just worry that since this book is geared toward clients, too few budding advisers will read it. How about putting out a version just for advisers, Rodger? - Roberta A. Grimes, JD, CFP

I bought this book after stumbling across it. I purchased a few financial planning books but found this to be the most helpful. I realized I am not fit to manage my own finances and wanted to get a better idea of what it is like to work with a financial advisor. Easy read and I actually understand it unlike most other financial books. The book gave me a lot of great insights.

This book is awesome! I cannot recommend this enough as a great read for people to help understand why and how to work with a financial advisor. Do yourself a favor and read this... I read it in a few hours. I wish this book has been around years ago.

I found this book to be both refreshing and insightful. The 30+ years of experience that went into writing this book is very evident. I applaud Friedman's viewpoints and instruction, and I recommend this book highly. This is a must read for people planning retirement, as I am. -- B. Scher Frederick Md.

This book is a must read for boomers such as myself who are in a position to utilize the services of a professional financial adviser. Rodger Friedman is one of America's foremost authorities on the relationships between clients and their financial advisers.I say this because he provides a play book of what to do and what not to do in creating an optimum relationship with the person or team in charge of financial guidance for your family. I have taken his advice to heart and improved the dynamics my family enjoys with our adviser. You will make a lot of reading choices this year that will impact the financial health of your family, make sure that Forging Bonds of Steel is at the top of your reading list.D. Roberson

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To be honest I was looking to give this book less than a 5 star rating but I cannot. Every new or those thinking of becoming a Financial Advisor needs to read this book. â œForging Bonds of Steelâ • is an easy read and gives great tips in building and strengthening business relationships. The ethics, care and service given to his clients goes above and beyond what a client expects. The clients served are not just a name, but a face with a name that deepens the client/FA relationship.

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