



Questions Great Financial Advisors Ask... and Investors Need to Know

Alan Parisse, David Richman

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A financial advisor recounts an interview with a recently retired physician who planned an enjoyable—and costly—retirement. The doctor wanted his entire portfolio in bonds, which was far too conservative to maintain the lifestyle he and his wife had planned. In the advisor's words:

"This fellow was a bit of a know-it-all, and I wasn't getting through. Finally I asked him, 'Doctor, how will it feel for you when you have to go back to work?' That got his attention, and I was able to lay out a strategy that would allow him to retire and stay retired."

In *Questions Great Financial Advisors Ask...and Investors Need to Know*, coauthors Alan Parisse and David Richman have compiled the questions great advisors ask that lead to the probing and personal conversations necessary to diagnose and understand clients'—and potential clients'—deep-seated feelings about money. That's how great advisors help clients wring the emotion out of investing and set them on the rational road to achieving their financial goals.

Throughout this book are questions, suggestions, and stories from some of the world's top financial advisors, including a chapter of "great questions to ask" organized by topic.

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