



# How to Become a Successful Financial Consultant: Making a Living Investing Other People's Money

By Jim H. Ainsworth

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## How to Become a Successful Financial Consultant: Making a Living Investing Other People's Money By Jim H. Ainsworth

Everything you need to know to succeed in today's fastest growing sector of the consulting market.

Jim Ainsworth is an extremely successful financial planning professional with more than 30 years in the business. In How to Become a Successful Financial Consultant, he tells you everything you need to know to move into financial consulting. He familiarizes you with all the types of planning that financial consultants deal with, as well as the various investment vehicles. And, based on his own experiences and those of other successful financial consultants across the nation, he supplies you with a proven blueprint for success. You get expert advice, guidance, and insiders' tips on how to:

- \* Get the education, experience, and licensing you need to qualify.
- \* Get certified (and whether you need to).
- \* Develop a surefire success plan.
- \* Set up a practice and attract clients.
- \* Network, market, and sell your services.
- \* Set fees and collect other forms of compensation for your services.
- \* Avoid the 10 most common mistakes that beginners make.
- \* Get the most out of meetings and professional conferences.

Written by Jim Ainsworth, a financial planning professional with 30 years in the business, this valuable guide provides professionals interested in making the move into financial consulting with everything they need to know to make a living investing other people's money.

Drawing on his personal experiences and those of colleagues across North America, Ainsworth covers all the bases. He begins by describing the three major groups of financial planners and the seven different styles of asset management and helps you to decide which is right for you. You find out all about the various types of financial planning that most consultants deal with--including estate planning, retirement planning, and family financial planning--and the best

investment vehicles currently available.

Ainsworth then cuts to the chase and provides the nuts-and-bolts information you need to make it as a financial adviser. Writing in a down-to-earth style, he tells you what type of education and experience you need to become an effective financial consultant, how to become licensed, how to get started in business, how to set fees and receive compensation, how to market your services and promote different financial instruments, and much more. He shows you how to develop a surefire success plan, and he supplies expert advice and guidance on how to avoid the top 10 beginners' mistakes.

Throughout this book, Ainsworth advocates taking a holistic approach to financial planning--one that takes into consideration not just people's differing needs, but their contrasting attitudes about money and investments. To that end, he provides insightful profiles of the different types of "money personalities" in the financial world and shows you how to identify and successfully work with each type.

How to Become a Successful Financial Consultant is your complete guide to making it in today's fastest growing sector of the consulting market.

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### Editorial Review

#### From the Publisher

In this extremely accessible book you will find everything you need to actively market yourself as a financial planner or consultant. With more than 30 years experience in the field, and the author of several books on the topic, Ainsworth succinctly discusses what education, certification, licenses and experience is required; what financial consultants do; how they get paid; how they can market and sell their services to find new clients; how to network; and the 10 top mistakes beginners make. Descriptions of the types of planning that most consultants deal with and various investment vehicles are interspersed throughout the text.

#### From the Inside Flap

How to become a Successful Financial Consultant Written by Jim Ainsworth, a financial planning professional with 30 years in the business, this valuable guide provides professionals interested in making the move into financial consulting with everything they need to know to make a living investing other people's money. Drawing on his personal experiences and those of colleagues across North America, Ainsworth covers all the bases. He begins by describing the three major groups of financial planners and the seven different styles of asset management and helps you to decide which is right for you. You find out all about the various types of financial planning that most consultants deal with—including estate planning, retirement planning, and family financial planning—and the best investment vehicles currently available. Ainsworth then cuts to the chase and provides the nuts-and-bolts information you need to make it as a financial adviser. Writing in a down-to-earth style, he tells you what type of education and experience you need to become an effective financial consultant, how to become licensed, how to get started in business, how to set fees and receive compensation, how to market your services and promote different financial instruments, and much more. He shows you how to develop a surefire success plan, and he supplies expert advice and guidance on how to avoid the top 10 beginners' mistakes. Throughout this book, Ainsworth advocates taking a holistic approach to financial planning—one that takes into consideration not just people's differing needs, but their contrasting attitudes about money and investments. To that end, he provides insightful profiles of the different types of "money personalities" in the financial world and shows you how to identify and successfully work with each type. How to Become a Successful Financial Consultant is your complete guide to making it in today's fastest growing sector of the consulting market.

#### From the Back Cover

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