

Retirement Portfolios, Set: Theory, Construction, and Management

Michael J. Zwecher



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Retirement Portfolios, Set: Theory, Construction, and Management Michael J. Zwecher A comprehensive set of retirement portfolio guidance for finance professionals

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 *Retirement Portfolios Set*—comprised of a book and workbook-will help you develop the essential skills necessary to excel at this discipline and give you a better understanding of the entire process. The book outlines how to create a portfolio that will provide income, continue to generate growth, and protect assets from disaster. While the workbook offers you a wealth of practical information and exercises that will solidify your understanding of the tools and techniques associated with this discipline.

- The book Examines how portfolios should be prepped in advance so that the transition from "working" portfolio to retirement portfolio is smooth and seamless
- The workbook will test your knowledge of the information addressed in *Retirement Portfolios*, before you put it to work in real world situations
- Details the differences in managing a retirement portfolio versus managing portfolios during asset accumulation years

The ability to create retirement portfolios and manage their risks are skills you must possess to be an effective financial advisor. *Retirement Portfolios Set* will help you achieve this elusive goal.



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