



## Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours (Hardback)

By David J. Drucker, Joel P. Bruckenstein

John Wiley Sons Inc, United States, 2013. Hardback. Condition: New. Revised, Updated ed.. Language: English . Brand New Book. Revolutionize your financial advisory practice with the latest cutting-edge tools Tired of spending more time with filing cabinets than with clients? Is overhead eating up your margins? In a new revised edition of the bible of practice management and technology for financial professionals, two leading financial planners, with some help from their friendsâ, deliver the knowledge advisors have been begging for. This book serves up a nontechnical trove of technology, clever workarounds, and procedural efficiencies tailored to help financial advisors in private practice move toward today's virtual office. The authors show you how to drastically reduce the paperwork in your office, slash overhead, and find anything you need in seconds using the latest software. This revised edition includes new information on SaaS and cloud computing, software integrations, mobile devices/apps, social media tools, portfolio accounting and outsourcing, collaborative tools, digital signatures, workflow management, marketing technology and much more. Perfect for successful practices seeking greater efficiencies and healthier profit marginsThe authors are well-known financial advisors, each with more than 30 years of experience in financial servicesAddresses the evolution of the virtual...



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