(continued from front flap)

Reading this book will give you confidence and knowledge – enough to really grasp who you are as an investor. *Then* you decide whether to seek a trusted advisor – or prefer to be a do-it-yourselfer. You will be successful because you will own a unique GPS, one robust enough to see through the tempting advertisements, financial media hype and slick brochures.

Charlotte is an entrepreneur and a Wall Street veteran, who knows the secret language of the financial services industry – from an insider's perspective. This valuable resource puts more than two decades of illuminating stories and unflinching advice at your fingertips for everyday reference. By understanding how the business of wealth management works, you can ask the important questions and identify those advisors you can trust, not just the ones who tell you what you want to hear. Take this convenient guide with you and become the CEO of your wealth today.

CHARLOTTE B. BEYER is founder of the Institute for Private Investors (IPI) and co-creator of the first Private Wealth Management curriculum for investors at The Wharton School of the University of Pennsylvania. An Aresty Fellow at Wharton, Beyer is also the recipient of the Lifetime Achievement Award from Family Wealth Report and the J. Richard Joyner Wealth Management Impact award from the Investment Management Consultants Association® (IMCA®).

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"A masterpiece that every investor should read and own."
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"Charlotte Beyer is a gifted 'translator.' She used her instincts, sensing the unique personal and emotional needs of that [HNW] world. Her book beautifully translates her thoughts, insights and instincts, helping families and investment managers with an understandable, and pragmatic, path to helping both."
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"This book distills a lifetime of experience and wisdom in a slim volume written in an easily accessible style. *Wealth Management Unwrapped* insightfully explores investor and industry (mis-) behavior and the challenges of crafting and sustaining a robust wealth management strategy."
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"Short. Candid. Fun and easy reading. Full of good advice and useful insights."
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- How do I know if I might prefer being a do-it-yourself investor?
- What is the difference between an advisor and a money manager?
- Where can I find a trusted financial advisor?
- Are fees too high?
- Why should I even care about conflicts of interest?
- What are the best questions to ask when interviewing potential advisors?
- How do I know if I can trust the firm's disclosure on fees?
- How will I know my advisor is doing a good (or bad) job?
- What does success look like for families of wealth?
- Why waste a human when a robot can do it cheaper?
- Can 'women with wallets' find advisors who won't stereotype them?

You know more than you think you do, but need to be aware of your blind spots.

(continued on back flap)