## (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<sup>®</sup> (IMCA<sup>®</sup>).

## PRAISE FOR WEALTH MANAGEMENT UNWRAPPED

"A masterpiece that every investor should read and own." —Lloyd Hascoe, Hascoe Associates

"At last a book that unwraps the mysteries of investing. A must-read for both sophisticated investors and those who want to better navigate the investment process."

- Richard Marston, James R.F. Guy Professor of Finance, Wharton School, University of Pennsylvania

- "Charlotte Beyer has dedicated her professional career to improving the wealth management business and this book is one of her greatest contributions to the industry. It's a smart, fun and creative snapshot of what investors should look for in their financial advisors and an important call for an improved client relationship."  **Sallie Krawcheck,** Founder and CEO, Ellevest
- "Einstein said, 'Everything should be made as simple as possible, but no simpler.' In *Wealth Management Unwrapped*, calling on her unrivaled experience, Charlotte Beyer has done just that with regard to the financial advice everyone needs."
- -Howard Marks, Co-Chairman, Oaktree Capital Management
- "Investors will benefit immensely if they exercise the disciplined steps of the 10 principles Beyer outlines." — Jay Hughes, author Family Wealth: Keeping It in the Family, and of Family – The Compact Among Generations
- "This is not only a book I will own, it is one I will share widely with my clients. Investors and other advisors will be well rewarded by joining me."
- -Harold Evensky, Chairman, Evensky & Katz
- "Charlotte's incredible experience in wealth management from both sides of the table makes this book indispensable for wealthy families *and* the advisors who wish to serve them. The new chapters on digital advice and 'women with wallets' brings this already excellent book right up to date on the disruptions affecting the wealth management industry."
- -Scott Welch, Chief Investment Officer, Dynasty Financial Partners
- "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."

- Ginny Corsi, Consultant, Corsi Associates

"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." — Ashvin B. Chhabra. President. Euclidean Capital LLC

Cover Design: Wiley Cover Images: Open box © Line - design/Shutterstock; Dollars roll © Africa Studio/Shutterstock

Subscribe to our free Personal Finance eNewsletter at wiley.com/enewsletters

Visit wiley.com/personalfinance





\$40.00 USA/\$48.00 CAN



BEYER

YE

D

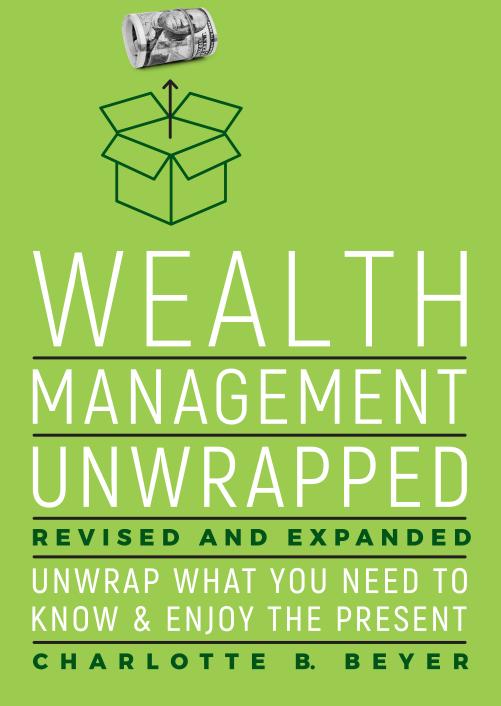
Π

NMR

J

 $\Box$ 

"Short. Candid. Fun and easy reading. Full of good advice and useful insights." — **Charles D. Ellis, author of** *The Elements of Investing* 



WILEY

WILEY

## Before you hire or fire anyone who's overseeing your money, read this book!

You will hear from an insider with a sense of humor who knows both the landscape and landmines of managing wealth. You will discover answers to questions like these:

- What kind of an investor am I?
- 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)