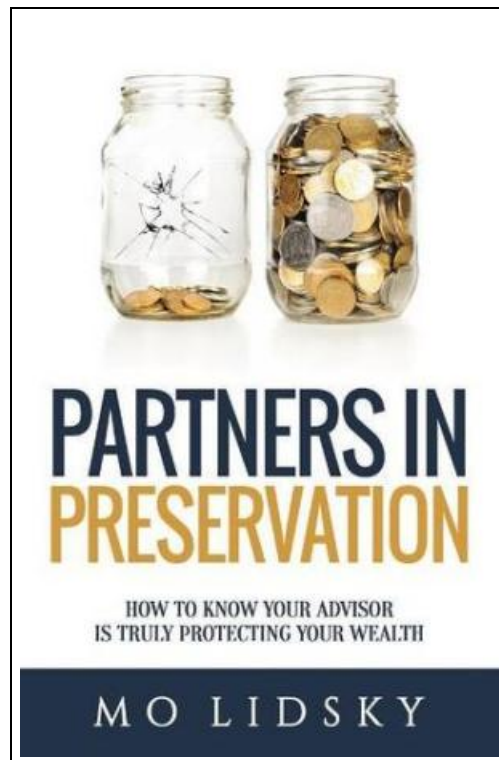


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PARTNERS IN PRESERVATION: HOW TO KNOW YOUR ADVISOR IS TRULY PROTECTING YOUR WEALTH (PAPERBACK)



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Dog Ear Publishing, United States, 2016. Paperback. Condition: New. Language: English . Brand New Book ***** Print on Demand *****. This book candidly and unabashedly tackles the myths and realities of investment advice. It will highlight the challenges of getting worthwhile help. It outlines how investors can access truly worthwhile investment advice, what to avoid and what are reasonable (or unreasonable) expectations of their advisors. The purpose of this book is to empower investors and elevate industry standards, so that consumers can be better served, and well-intentioned advisors are better equipped to serve them. The inspiration for Partners in Preservation came from losing money - a lot of money. In the aftermath of the global financial crisis of 2008, I was staring at my brokerage statements in shock and disbelief. How could my portfolio be a fraction of its original value? How could the cadre of financial advisors I used have possibly gotten me into this mess? And I was not the only one. During that time, I was involved in overseeing the Canadian endowment for my alma mater, Yeshiva University. I was surrounded by captains of industry, the most respected corporate executives, extremely successful entrepreneurs, and seasoned investors. They comprised my investment committee. Yet, in the weeks and months after the crash of financial markets, as we sat there analysing the carnage of the portfolio, it became clear that no one understood how we got here, why our advisors proved useless during this period, and who was going to get us out. As I probed these questions, it occurred to me that the mistake was not really the advisors , as much as it was ours. We were all leaning on pillars that did not exist, relying on promises that could not be made, and buying into fiction -...



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