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Get Wise to Your Advisor: How to Reach Your Investment Goals Without Getting Ripped Off

Steven D. Lockshin

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The financial services world is changing. Technology is enabling an automated approach to investing that should bring down the cost of commodity services. No longer do you have to fund the lifestyle of a broker or advisor to have him tell you how to diversify or where to find the next investment that cannot be missed. This book will provide the tools for calculators that tell you most of what you need to know; from how much insurance you need to have to how you should diversify. The book will help readers with the following:

- Understand what you have
- Plan your long-term goals
- Start to save (maximizing your 401k)
- Reduce debt
- Run your Monte Carlo Simulation
- Determine the appropriate asset allocation
- Set up your auto-rebalancing and periodically (annually, perhaps) re-examining your asset allocation to account for globalization
- Deploy the asset mix through low cost, tax-efficient strategies
- Look at it once per year

This book will provide a better understanding of your investment decisions. But, we all cannot be do-it-yourselfers. Advisors serve as an important resource for consumers when they are both capable and understand their duty to serve you, the customer, first. To complement their moral station, they must have the skills to deliver appropriate advice. The book, much like the company Steve founded, will simplify standards for consumers and audit advisors to those standards.

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