

52 IDEAS FOR PERSONAL FINANCE SUCCESS

2ND EDITION



JOHN
MIDDLETON



Personal Finance Success Community Favorite

California. State Real Estate Division

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How to Open & Operate a Financially Successful Personal Financial Planning Business Peg Stomierowski,Kristie Lorette,2011-09-30 Millions of Americans every year have troubles with their finances They turn to experts in droves asking for help in filing their taxes consolidating their debt or just planning how they will pay their bills and invest their retirement funds This book was written for anyone who has ever wanted to dip his or her foot into financial planning but did not know where to start You will learn the fundamental basics of financial planning starting with the very process that most planners use to organize their own finances You will learn how to organize financial statements and to create plans and how to properly manage taxes to great effect You will learn how to manage basic assets such as cash savings home equity and auto mobiles You will learn how to effectively manage credit and how to deal with insurance including life insurance health insurance and property insurance Whether you will be operating out of your home or you are looking to buy or rent office space this book can help you with a wealth of startup information from how to form and name your business to deciding if this will be a joint venture or if you would rather work solo You will learn how to build your business by using low and no cost ways to satisfy customers and also ways to increase sales have customers refer others to you and thousands of excellent tips and useful guidelines This complete manual will arm you with everything you need including sample business forms contracts worksheets and checklists for planning opening and running day to day operations lists plans and layouts and dozens of other valuable timesaving tools of the trade that no business owner should be without For all prospective financial planners this guide will give you a complete walkthrough and timeline of what you need to accomplish to be effective The companion CD ROM is included with the print version of this book however is not available for download with the electronic version It may be obtained separately by contacting Atlantic Publishing Group at sales atlantic pub com Atlantic Publishing is a small independent publishing company based in Ocala Florida Founded over twenty years ago in the company president e tm s garage Atlantic Publishing has grown to become a renowned resource for non fiction books Today over 450 titles are in print covering subjects such as small business healthy living management finance careers and real estate Atlantic Publishing prides itself on producing award winning high quality manuals that give readers up to date pertinent information real world examples and case studies with expert advice Every book has resources contact information and web sites of the products or companies discussed **Kiplinger's Personal Finance** ,1974-09 The most trustworthy source of information available today on savings and investments taxes money management home ownership and many other personal finance topics

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