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The Right Way to Hire Financial Help - 2nd Ed.: A Complete Guide to Choosing and Managing Brokers, Financial Planners, Insurance Agents, Lawyers, Tax Preparers, Bankers, and Real Estate Agents

Charles A. Jaffe

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Hiring financial help is a task that many otherwise savvy people approach the wrong way, opting to go on recommendations from family and friends, chance encounters, or advertisements rather than on sound research. In engaging, accessible prose, nationally syndicated columnist Charles A. Jaffe takes the reader through the basics of how to locate appropriate candidates, understand their credentials, check references, conduct initial interviews, maintain control of the relationships and one's finances, and fire an adviser who is not working out.The book contains guidance on hiring and checking the backgrounds of seven types of advisers--brokers, financial planners, insurance agents, lawyers, tax preparers, bankers, and real estate agents--as well as specific questions to ask to determine whether an adviser is a good, qualified match. In addition the book offers guidance on how to help the advisers function as a team. The author's aim is to help the reader assemble and manage a pool of advisers to serve every major financial need for the rest of his or her lifetime. This new edition has been updated throughout. It includes, hundreds of Web addresses and an online resources directory. Two new chapters discuss online advice services and how to choose an online broker.

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