The Team Approach to Tax, Financial & Estate Planning

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Practitioners just starting out in the financial planning arena may not possess the myriad skill-sets and substantive knowledge required to embark on this new business venture. CPAs who don't have all the necessary talent in-house, may find it easier to align themselves with strategic "partners" who can provide the proper skills, training, technology, support and solutions in their specialized disciplines and niches, to identify and meet their clients' financial goals.

The Team Approach to Tax, Financial & Estate Planning will educate practitioners in the various disciplines and sub-specialties of financial services, that may not be present in every firm, but which are essential to growing a financial services practice. For this team the CPA may choose to bring together outside accountants, attorneys, insurance brokers, real estate agents, appraisers, stockbrokers, management consultants, psychologists, or others.

Each chapter in this guide, written by an expert in his or her field, will introduce the types of professionals needed and how the professional's expertise can enhance the engagement.

This is an excellent, evergreen reference source for the seasoned professional and for the new practitioner.

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