

Investment Planning

Geoffrey Hirt, Stanley Block, Somnath Basu



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In Investment Planning, two of the best-known authors in the investment planning field, Geoffrey A. Hirt and Stanley B. Block, have joined forces with finance expert, Somnath Basu, to show financial planners how to successfully manage their clients' investments consistent with their personal objectives and levels of risk tolerance.

This landmark book carefully explains the essential theory required to understand how financial markets work_and describes step by step how best to diversify and balance a portfolio of investments to reduce risk and increase expected returns.

Ranging from fixed-income securities, common and preferred stock, and mutual funds...to options, futures, derivatives, and other investment vehicles, Investment Planning cuts through the complexities of today's burgeoning financial landscape with clear, concise accounts of:

Taxation of investment vehicles An excellent resource for preparing for the Certified Financial Planner (CFP) exam, this comprehensive reference also includes real-world case studies and listings of investment websites in each chapter_plus a broad array of at-a-glance charts and tables. Authoritative and completely upto-date, Investment Planning now offers professionals all the tools, techniques, and guidance they need to seize new opportunities in the financial marketplace and maximize returns on their clients' investments!

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