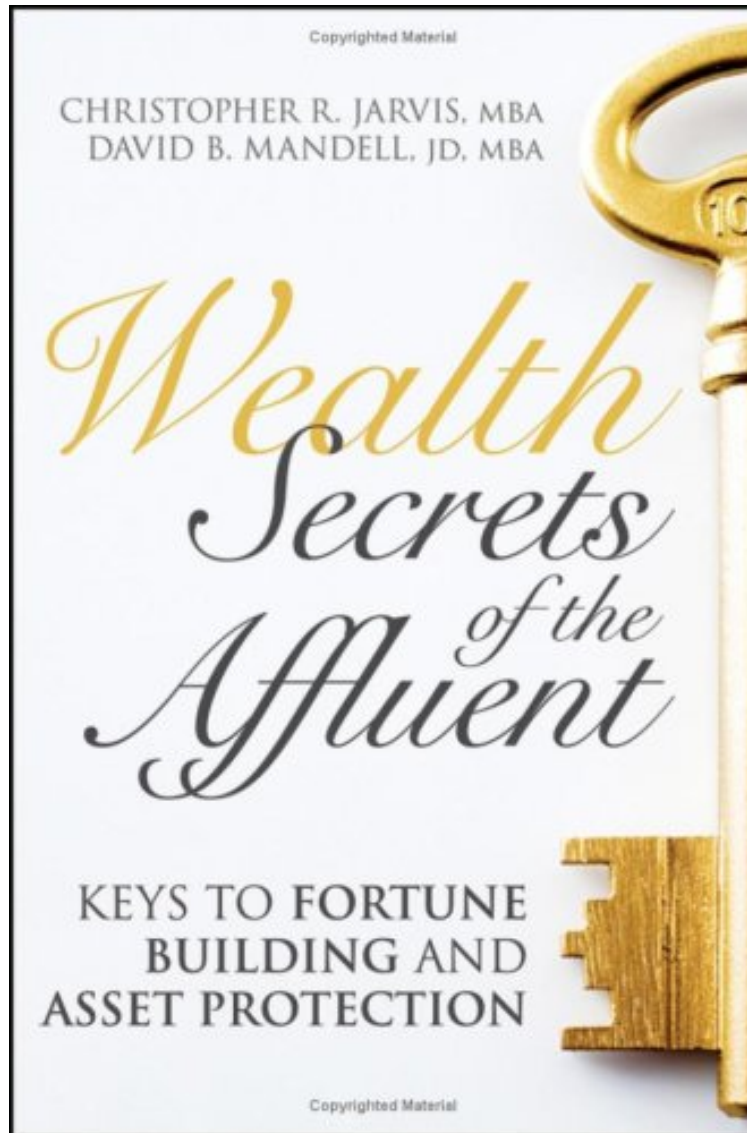


Wealth Secrets of the Affluent: Keys to Fortune Building and Asset Protection

Christopher R. Jarvis, David B. Mandell
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#1314464 in Books 2008-04-04Original language:EnglishPDF # 1 9.30 x 1.22 x 6.30l, 1.30 #File Name: 047013979X376 pages | File size: 39.Mb

Christopher R. Jarvis, David B. Mandell : Wealth Secrets of the Affluent: Keys to Fortune Building and Asset Protection before purchasing it in order to gage whether or not it would be worth my time, and all praised Wealth Secrets of the Affluent: Keys to Fortune Building and Asset Protection:

0 of 0 people found the following review helpful. Five StarsBy Prime MemberMy wife loved it! Thanks2 of 2 people

found the following review helpful. Sophisticated advice for the affluent or aspiring affluent
By Michael Carrigan
Practical guidance written in plain English. Begins with acquiring the appropriate mindset, leverage and advisors. Follows with essential techniques in asset protection, taxes, estate planning, insurance and investments. Must reading for those who understand that following commonly prescribed financial advice will not significantly alter one's financial condition or class in society. Includes topics such as outgrowing mutual funds, investments not available to the average American, protecting IRAs from 70% taxation at death, A-B living trusts, long term care insurance, and using real estate and cash value life insurance as tax-deferred investment vehicles.
8 of 8 people found the following review helpful. A good look...
By Author Jacob Cooper
I truly appreciate the discussion on the importance of where financial advice comes from and the motivation of the outlet providing it. I agree with the authors that this book isn't for those who desire to be financially mediocre. That's fine. It's probably most applicable for anyone who is wealthy or whoever has a desire to become wealthy. Not everyone does have that desire, and that's ok.

Wealth Secrets of the Affluent reveals the ten keys to financial success that affluent families have used for decades. This is a must read for anyone who earns over \$150,000 per year or any family that is worth over \$2,000,000, as well as any advisor who makes a living assisting wealthy clients or would like to attract wealthy clients with more appropriate and more effective advice. There are specific strategies used to achieve unparalleled wealth, and this book puts them in perspective.

From the Inside Flap
Most financial magazines and Web sites speak to the planning needs of the average American audience of over 200 million people and the target of most advertising revenue. Simultaneously, the majority of investment advisory, law, and accounting firms focus on this large market because it is more profitable to provide "cookie-cutter" financial planning to the masses than highly specialized planning to the elite. As a result, over twenty million affluent families and millions of hard-working Americans who strive to be wealthy struggle to find financial and legal information that speaks to their unique needs and goals. These people need more than "off-the-rack" planning advice, which is why financial expert Christopher Jarvis and asset protection attorney David Mandell authors of the well-received personal planning guide Wealth Protection: Build and Preserve Your Financial Fortress have created Wealth Secrets of the Affluent. Written in a straightforward and accessible style, Wealth Secrets of the Affluent reveals the ten "keys" to financial success that super-affluent families have used for decades. This is a must read for anyone who earns over \$150,000 per year or any family that is worth over \$2,000,000, as well as any advisor who makes a living assisting wealthy clients or would like to attract wealthy clients with more appropriate and more effective advice. Wealth Secrets of the Affluent teaches readers the only way to effectively achieve affluence, and provides a variety of practical strategies for protecting assets, investing wisely, maximizing family wealth, and reducing unnecessary income, capital gains, and estate taxes. This book examines the essential lessons to building a fortune and protecting assets, explains the many pitfalls associated with this endeavor, and outlines the strategies and techniques that can be used to overcome these challenges. Along the way, you'll also discover why conventional financial solutions just don't make sense for the affluent individual or wealthy family. Throughout the book, industry experts Jarvis and Mandell share their extensive experiences in this field as they address issues such as: why the Nobel Prize-winning asset allocation model used by most firms will fail for affluent clients, which underused financial vehicles should be integral parts of affluent family planning, why taxes can't be left out of the planning equation, and how to determine if your present advisors are failing you and what to do about it if they are. If you feel like you've never been armed with the right information to help you become wealthy, if you're concerned about the many potential threats to your wealth, or if as an advisor you'd like to enhance your understanding of what it takes to help affluent clients build wealth and protect assets, then this is the book for you.
From the Back Cover
Wealth Secrets of the Affluent
Most of the financial guidance you'll find in books, magazines, and on the Internet is directed toward the average American. Editors have no choice but to generate content for the masses in their quest to garner the highest possible advertising dollar. Financial and legal firms also tend to focus on this large group because it is more profitable to provide "cookie-cutter" financial planning to the many than highly specialized planning to the elite. As a result of this focus on the masses, millions of affluent families and hard-working Americans who strive to be wealthy are left with inappropriate, "off-the-rack" advice instead of the customized solutions their unique financial situations require. Financial expert Christopher Jarvis and asset protection attorney David Mandell have created Wealth Secrets of the Affluent to fill this void. Containing in-depth insights and practical advice, this reliable resource is the first book designed to help affluent families and their advisors build and preserve wealth. Industry experts Jarvis and Mandell share their extensive real-world experiences and focus on the ten essential "keys" to fortune building and asset protection that this country's wealthiest families have relied upon for decades. If you are a member of a wealthy family, are an advisor to the affluent, or would like to be in either of these categories, Wealth Secrets of the Affluent is a must read. Some of the topics covered include:
The only successful strategy to achieve affluence
Using other people to make you more money
Building the right team of advisors
Protecting your assets from lawsuits, taxes, and divorce
Avoiding financial disasters
Legally reducing taxes
There are certain financial solutions that make sense for affluent

families, and with *Wealth Secrets of the Affluent*, you'll quickly discover what they are and how to apply them in your endeavor to build an affluent family of your own.

About the Author Christopher R. Jarvis, MBA, is a financial planner with experience as an actuary and entrepreneur. He is cofounder, with Mr. Mandell and Jason M. O'Dell, of O'Dell Jarvis Mandell, LLC, which is based in the cities of Austin, New York, Cincinnati, and Ft. Lauderdale, and has affiliate offices nationwide (www.ojmgroup.com). David B. Mandell, JD, MBA, is an attorney and financial advisor to high-net-worth clientele. He is the shareholder of the Law Offices of David B. Mandell, PC (www.mandellpc.com). Along with Mr. Jarvis, Mandell is coauthor of the Wiley title *Wealth Protection: Build and Preserve Your Financial Fortress*. www.secretsoftheaffluent.com www.ojmgroup.com