



accountingWEB | Wealth Management

Contributor's Corner



Tony Batman,
chairman and
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The late spring, post-tax season is the perfect time to work on growing your business. This issue of the monthly AccountingWEB Wealth Management newsletter shares easy-to-implement marketing tips that will expand your firm's reach.

- *The Landscape* shares essential information on how to best market your firm. One of the most effective ways: Ask existing clients for referrals.
- *From The Wealth Management Academy®* features tips on how to conduct a discovery meeting with new clients, which will lead to a successful, long-lasting relationship.
- In *Peer2Peer*, providing a second opinion on a tax client's financial plan nets benefits for both the client and a CPA/wealth management firm.

The Landscape

Welcome to The Landscape, a monthly feature article that provides insights into the wealth management industry from a tax-centric point of view. With the economic and tax landscapes constantly shifting, CPA and tax firms have a unique opportunity to change how their clients view and manage their economic futures more efficiently and effectively. Keeping an eye on The Landscape can help you navigate the road to wealth management success.

The Dreaded "M" Word: Why Marketing Isn't as Hard as You Think



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Creating top-of-mind awareness of the solutions your firm offers is an essential ingredient in the success of any wealth management firm. Consistent marketing of these solutions can be the key difference between a marginal wealth management firm and a hugely successful one.

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From The Wealth Management Academy®

The 1st Global Wealth Management Academy® offers three distinct educational platforms for tax-centric wealth management firms, each possessing its own advantages: classroom-based education, Web-based instruction and self-study. As part of 1st Global's commitment to progressive, ongoing education, the Wealth Management Academy® provides the opportunity to attain the knowledge, skills and habits necessary to become a highly successful wealth management firm. From The Wealth Management Academy® brings the academy to you in monthly installments.

Discovery Meeting Should Be the Beginning of a Beautiful Relationship



Client meetings give CPAs the opportunity to put all their tools to work. Done well, they are productive and rewarding, both monetarily and psychologically. Improperly done, they can be a disaster.

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Peer2Peer

Peer2Peer is your source for case studies and best practices in wealth management coming directly from your colleagues. With experienced advice from your peers within the tax profession, you can glean business-building strategies and tactics to enhance the wealth management services your firm provides or seeks to embrace. Leverage the knowledge of industry leaders to carve your own path to success with Peer2Peer.

A Simple Review Adds Value for Clients, More Business for Firm



Michele
Tremblay,
CPA,
champion
partner of
WABC Wealth
Management
Services

As CPAs and financial advisors, we strive to help our clients get to a better place in life. But every once in a while, you come across a client who has done everything right.

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About 1st Global

1st Global was founded in 1992 by CPAs who believe that accounting, tax and estate planning firms are uniquely qualified to provide comprehensive wealth management services to their clients.

1st Global provides CPA, tax and estate planning firms the education, technology, business-building framework and client solutions that make these firms leaders in their professions through dedicated professional client relationships built around wealth management.

More than 450 firms have chosen to affiliate with 1st Global, making us one of the largest financial services partners for the tax, accounting and legal professions.

1st Global Capital Corp. is a member of FINRA and SIPC and is headquartered at 8150 N. Central Expressway, Suite 500 in Dallas, Texas, (214) 265-1201. Investment advisory services offered through 1st Global Advisors, Inc., an SEC-Registered Investment Adviser. Additional information about 1st Global is available via the Internet at www.1stGlobal.com

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