July 25, 2012

accountingWEB | Wealth Management

Contributor's Corner

Tony Batman, chairman and CEO, 1st Global

What do fly-fishing clubs, the FBI and thought-provoking riddles have to do with your business? How can you assist a procrastinator in preparing for retirement? Find out in this month's edition of the AccountingWEB Wealth Management newsletter.

- In *From the Wealth Management Academy®*, 1st Global Chief Marketing Officer Brian Finnigan shows you five relationship marketing strategies that can help to grow your business beyond your expectations.
- In *Peer2Peer*, we share a case study of a small business owner who hasn't effectively planned for his retirement — and he wants to retire in five to 10 years! See how a defined-benefit plan might help him save a bunch of money in a hurry.
- Now more than ever, people want to consolidate their tax and financial planning services with a single trusted advisor. In *The Landscape*, I discuss 10 areas of concern that financial professionals must fully explore to best serve their clients' needs.

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.

Five Relationship Marketing Strategies that Work

Brian Finnigan, vice president and CMO, 1st Global

One of the most effective ways to market your services and brand is through the strong relationships you already have with existing clients. Relationship marketing leads to a greater client experience with your firm. A greater client experience translates into a stellar reputation for your firm, which in turn leads more of the right clients to your door.
Read More...

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.

Are Defined-Benefit Retirement Plans Better for Small Businesses?

While small business owners typically use defined-contribution plans with an elective deferral feature to provide retirement benefits to employees, defined-benefit plans may be ideal for small-business owners over 50 who are interested in saving a substantial amount of money for retirement in a short time period.
Read More...

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.

Focus on the Four Stages of Wealth to Reach Full Potential

Tony Batman, chairman and CEO, 1st Global

Now more than ever, clients approaching the retirement red-zone want to consolidate their financial services with a single trusted advisor. They want a firm that has the ability to craft solutions for a wide spectrum of financial planning and tax issues.
Read More...

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

9449 Priority Way W Drive
Suite 150
Indianapolis, IN 46240