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Wealth Management

Contributor's Corner



This AccountingWEB.com newsletter educates you on the gender challenges facing the financial services industry and the importance of meeting the needs of women clients in *From the Wealth Management Academy*. A 1st Global advisor uses movies to discuss his "why" in *Peer to Peer*, and Nate Biddick urges advisors to erase "I can't" from their vocabularies in *The Landscape*.

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.

Meeting the Needs of Women Clients



Cindy Scott,
manager,
[1st Global](#)
Wealth
Management
Academy

Think of the best relationship you have with a male client. He's been with you for many years and you consider yourself "old friends." How is your relationship with his wife? If your answer is anything other than "spectacular," you should read the following carefully: There's a 70 percent chance your client's wife will fire you within a year after the death of her spouse.

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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.

Finding Financial Planning Wisdom in Hollywood's Great Movies



Jeffrey L.
Watson,
CPA/CFP®,
principal,
WealthCare
Financial Group
LLC,
[1st Global](#)

One of the most important traits of a successful business owner is knowing "why" - why you do what you do. In a service-based business like ours, knowing your "why" is essential to helping clients feel confident that you are giving them excellent advice and to knowing you care about them and their families.

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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 Myth of "I Can't"



Nate Biddick,
manager,
Practice
Consulting
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What you believe is the most important thing about you. To accomplish something you never accomplished before, you need to challenge those beliefs.

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COMPLIMENTARY WHITEPAPER:
Our Beliefs About Investing



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The 1st Global Philosophy for Disciplined, Long-Term Investors

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 400 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 12750 Merit Drive, Suite 1200 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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