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accountingWEB | Wealth Management

Contributor's Corner

1st Global

With uncertainty about their future in retirement, many clients are asking the question – How much is enough? This AccountingWEB.com newsletter educates you on helping clients understand what their financial needs may be during the latter years of life in *From the Wealth Management Academy*. In *The Landscape*, 1st Global President and Chief Operating Officer David Knoch shines a light on the bright future of the CPA industry. Thinking of buying another firm? In *Peer to Peer*, two 1st Global advisors discuss where to begin.

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.

When it Comes to Retirement: How Much Is Enough?

A recent study from the Employee Benefit Research Institute (EBRI) shows that people are not confident they will have enough saved for retirement. The March 2013 Retirement Confidence Survey revealed that 49 percent of those polled indicate they are "not very confident" or "not at all confident" they will have enough income in retirement.
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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.

Key Considerations When Buying a Firm

Thinking of buying a firm but not sure where to start? That question is being contemplated more and more every day with more mergers, acquisitions and consolidation taking place across the accounting and wealth management industry today.
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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.

What Gives the Next Generation an E.D.G.E.?

The implication to today's senior leaders is clear: to be the best version of itself in the future, the firm must start today by understanding, nurturing and involving their next generation. The firms that get this right will be the benefactors of growth, sustainability and meaning.
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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 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) 294-5000. 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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