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accountingWEB | Wealth Management

Contributor's Corner

For the final wealth management newsletter of the year, we wanted to give you a second chance at some of the most popular articles from recent months. In *From the Wealth Management Academy*, the author offers five tips for success during the busy season. In *Peer 2 Peer*, 1st Global advisor Terry Jannsen of Jannsen + Co. in Wisconsin shares his insights on hosting a successful client seminar. In *The Landscape*, 1st Global founder and CEO Tony Batman discusses how CPAs can assist clients by focusing on the four stages of wealth. These articles can be used to spark your pre-tax season planning in order to get your 2014 off to a great start.

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 Tips to Ensure Success During this Busy Season

Ever wonder what separates the most successful CPAs and financial advisors from the pack? Many industry-leading firms attribute their success to their ability to get the most out of year-end planning meetings and tax-season meetings with their clients.

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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.

The Benefits of Hosting a Client Seminar

Do you value your clients? Are you doing everything you possibly can on their behalf? Do they view your firm as a leader in the community? If you're not answering yes to all of these questions, then it's time to start thinking about hosting a client seminar.

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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.

Focus on the Four Stages of Wealth to Reach Full Potential

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.

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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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