Resources for The Annual Renewal Meeting

Books

Ross Levin, *The Wealth Management Index*, Irwin/McGraw-Hill, 1997.

David H. Maister, Charles H. Green and Robert M Galford, *The Trusted Advisor*, The Free Press, 2000.

Mitch Anthony, *Your Clients for Life, The Definitive Guide to Becoming a Successful Financial Life Planner*, Dearborn Trade, 2002.

Roy Diliberto, *Financial Planning, The Next Step: A Practical Approach to Merging Your Clients' Money With Their Lives*, FPA Press, 2006. http://www.fpanet.org

Other resources

"Policy-Based Financial Planning in a Turbulent World" by Dave Yeskie and Elissa Buie, article in the July 2006 issue of the Journal of Financial Planning – official publication of the Financial Planning Association – http://www.fpanet.org

"This Appreciative Moment©" a regular e-column by Ed Jacobson, Ph. D. on appreciative questions in the financial planning process. To sign up: edjacobson1@sbcglobal.net.

Financial DNA – www.coddington.com – Hugh Massie 404-812-5318. Tools and assessments for knowing you clients' money personality and style and communication.

Financial Life Planning Online www.flponline.net Online client interactive tools developed by Mitch Anthony for dynamic financial planning. For information, contact (607)772-1798

Money Quotient, Inc. – www.moneyquotient.com Founder and president, Carol Anderson. Practice tools, assessments, workshops and newsletter for the financial life planning ® process.

White papers on monitoring and providing ongoing financial planning, using the Wealthcare™ process and Monte Carlo/scenario planning software tool developed by Financeware, Inc. –   http://www.financeware.com/