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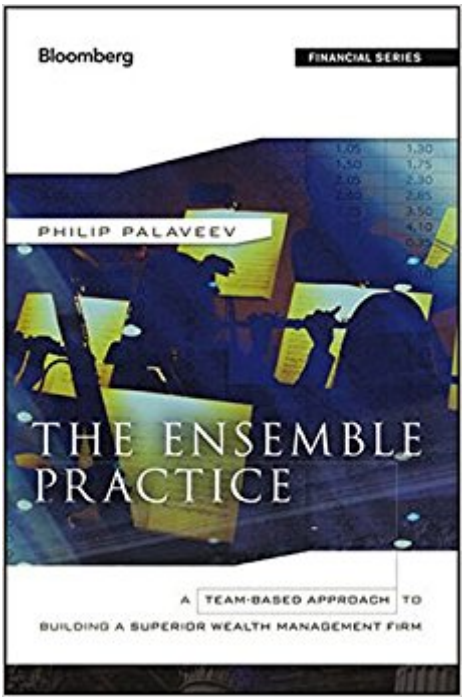
The Ensemble Practice: A Team-Based Approach To Building A Superior Wealth Management Firm



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Synopsis

A detailed road map for wealth managers who want to build an ensemble firm or team and achieve sustained growth, profitability and high valuations Why do ten percent of wealth management firms grow faster than the rest of the industry, often despite the turbulence of the markets? The answer, according to industry consultant and researcher, P. Palaveev, is that the most successful firms are those which, create and promote a team-based service model that serves as the foundation of their enterprise. Find out how and why a team-based service model can play a decisive role in the future growth and sustained success of your wealth management firm Discover the key factors for building a successful ensemble firm and profit from the best practices top team-based firms employ Profit from the author's years of experience working with the world's top wealth management firms and the data he has compiled as a pre-eminent industry researcher Learn about the various organizational structures, partnership models and career path options and how to put them to work building an ensemble practice Get the lowdown on how the savviest traditional broker-dealer firms have formed dynamic ensemble teams within their organizations and learn of the results they've achieved

Book Information

Hardcover: 240 pages

Publisher: Bloomberg Press; 1 edition (October 2, 2012)

Language: English

ISBN-10: 1118209540

ISBN-13: 978-1118209547

Product Dimensions: 6.3 x 0.9 x 9.4 inches

Shipping Weight: 1 pounds (View shipping rates and policies)

Average Customer Review: 4.7 out of 5 starsÂ Â See all reviewsÂ (6 customer reviews)

Best Sellers Rank: #362,111 in Books (See Top 100 in Books) #67 inÂ Books > Business & Money > Industries > Financial Services #86 inÂ Books > Business & Money > Finance > Wealth Management #2864 inÂ Books > Business & Money > Investing

Customer Reviews

I am the CEO of a multi-million-dollar revenue RIA firm with something in excess of 300 million dollars of client assets under direct management so we are large by some measure and just a nit on an elephant's hind end by many. I have known of Philip Palaveev for a decade or more from hearing him speak back when he was at Moss Adams. I purchased this book thinking that it would be a

bunch of psychobabble from an accountant-like point of view. On the contrary, I found the book to be full of insights. I am an avid underliner and desecrator of business books and I have some interesting point marked up and noted in every chapter. Sometimes it is an admonition for our firm to do something new or to consider it..... and at others the underline is sweet vindication for pausing to celebrate that it appears we are doing something right. Though I have heard Philip speak, I do not know him personally, nor would he know me so I am not being favored in any way for writing this encouragement to read this book. This is a great book if you want to peek under the tent of how to operate a successful RIA as a business instead of some small barbershop that will die with the owner. I am giving a copy of this book to everybody on our team because we desire to mentor the wonderful young men and women in our firm to think like successful business people and NOT like so many self-centered advisors who think hunting is the only admirable skill. Our industry is changing folks....

To the point, with no nonsense included, this book was easy to read and understand. The ensemble, while not unique to other industries, is a difficult concept for advisors to envision. Palaveev does a good job raising the key issues of why an ensemble firm is more valuable for you, and your clients.

This book brings up a lot of issues that often are not considered by those about to embark on an ensemble path. I bought a copy for all of the advisors on our team, and it was helpful in discussing those issues.

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