



Retirement Portfolios: Theory, Construction and Management

By Michael J. Zwecher

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Retirement portfolio guidance for finance professionals

Retirement is one of the most important parts of the financial planning process. Yet only two percent of financial advisors describe themselves as competent in retirement planning.

Constructing a retirement portfolio is viewed as a difficult endeavor, and the demands facing financial advisors responsible for this task continue to grow. The pressures are particularly intense due to events such as the financial crisis and oncoming rush of retiring baby boomers. It is imperative that financial advisors be equipped and ready to create appropriate retirement portfolios. That's why Michael Zwecher—a leading expert on retirement income—has created *Retirement Portfolios*.

- Examines how portfolios should be prepped in advance so that the transition from "working" portfolio to retirement portfolio is smooth and seamless
- Outlines how to create a portfolio that will provide income, continue to generate growth, and protect assets from disaster
- Details the differences in managing a retirement portfolio versus managing portfolios during asset accumulation years

The ability to create retirement portfolios and manage their risks are skills you must possess to be an effective financial advisor. *Retirement Portfolios* will help you develop these essential skills and gain a better understanding of the entire process.

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Retirement Portfolios: Theory, Construction and Management By Michael J. Zwecher Bibliography

- Sales Rank: #960825 in Books
- Published on: 2010-01-26
- Original language: English
- Number of items: 1
- Dimensions: 9.30" h x 1.02" w x 6.30" l, 1.05 pounds
- Binding: Hardcover
- 281 pages

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Editorial Review

Review

'A very practical and well argued philosophy for retirement funding that will make sense to practitioners.'
(Journal of Pensions, Economics and Finance, July 2011).

From the Inside Flap

Retirement is one of the most important parts of the financial planning process. Yet only a small percentage of financial advisors describe themselves as competent when it comes to creating portfolios designed to meet retirement needs.

Constructing a retirement portfolio is viewed as a difficult endeavor, and the demands facing financial advisors responsible for this task continue to grow. The pressures are particularly intense due to events such as the financial crisis and oncoming rush of retiring baby boomers. It's imperative that financial advisors be equipped and ready to create appropriate retirement portfolios. That's why Michael Zwecher—a leading expert on retirement income—has created *Retirement Portfolios* as well as the companion *Retirement Portfolios Workbook*.

In *Retirement Portfolios*, Zwecher provides you with complete coverage of the most important issues in this field. Page by page, he shows you what it takes to protect your client's retirement and aspirations. Divided into four comprehensive parts, this reliable resource:

- Examines how portfolios should be prepped in advance so that the transition from "working" portfolio to retirement portfolio is smooth and seamless
- Outlines how to create a portfolio that will provide income, continue to generate growth, and protect assets from disaster
- Details the differences in managing a retirement portfolio versus managing portfolios during asset-accumulation years
- Discusses how to maximize the usefulness of retirement portfolios in your business—whether it's transaction-based or fee-based, institutional or retail

The ability to create retirement portfolios and manage their risks are skills you must possess to be an effective financial advisor. *Retirement Portfolios* will help you develop these essential skills and gain a better understanding of the entire process.

From the Back Cover

"Mike Zwecher's new book expands on an important approach to building retirement portfolios that is being integrated into RIIA's Retirement Management Analyst (RMA) curriculum. *Retirement Portfolios* is an important book that you can use here and now. It is required reading and an important piece of the RMA curriculum." —**François Gadenne, Chairman and Executive Director, Retirement Income Industry Association (RIIA)**

"The approach to successfully managing assets for retirees and near retirees is a much different endeavor than the traditional approach used for wealth accumulation purposes. Mike Zwecher lays out a thoughtful and practical process that all baby boomers and their financial advisers should read." —**John Carl, President, Retirement Learning Center**

"Retirement planning in the post-2008 world requires a new thinking. It requires new ways of approaching a client's cash flow and balance sheet, new ways of assessing a client's retirement risks, new ways of managing retirement risks, and new ways of building retirement portfolios that produce income and growth, that create a floor and upside. Michael Zwecher's book represents all that and then some. This book not only builds on the existing body of knowledge but expands it in ways that make it a must-read for anyone who holds themselves out to be a credible retirement planner." —**Robert Powell, Editor, Retirement Weekly, a service of MarketWatch.com**

"Mike offers the financial advisor community and their clients a thoughtful playbook to help them navigate through the retirement process with confidence. Retirement planning is not only about laddered bonds and annuities, but requires a structural foundation similar to Modern Portfolio Theory to support retirement planning and *Retirement Portfolios* puts us on the right path." —**Bruce E. Wolfe, CFA, Chairman, Allianz Retirement Market Committee**

Users Review

From reader reviews:

Christina Epp:

The ability that you get from *Retirement Portfolios: Theory, Construction and Management* will be the more deep you digging the information that hide inside the words the more you get considering reading it. It does not mean that this book is hard to comprehend but *Retirement Portfolios: Theory, Construction and Management* giving you thrill feeling of reading. The writer conveys their point in particular way that can be understood by means of anyone who read the idea because the author of this book is well-known enough. This specific book also makes your personal vocabulary increase well. It is therefore easy to understand then can go together with you, both in printed or e-book style are available. We propose you for having this kind of *Retirement Portfolios: Theory, Construction and Management* instantly.

Jerry Raminez:

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Eric Ballentine:

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