



2013 Field Guide to Financial Planning (Tax Facts Series)

CLU Michael E. Kitces, CLU D. M. Donald F. Cady

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The 2013 Edition of *Field Guide to Financial Planning* is the sales strategy tool that no financial planner should go without.

Field Guide to Financial Planning offers step-by-step solutions to hundreds of planning needs and challenges. It is the definitive guide for agents and financial planners to identify, understand, and employ the concepts and techniques used in financial and wealth management planning.

Discover targeted planning opportunities and illustrated strategies for:

- Portfolio Management
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- Futures
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- And much more!

The 2013 edition of *Field Guide to Estate Planning, Business Planning & Employee Benefits* has been completely updated to include:

- Provisions of the American Taxpayer Relief Act of 2012
- Additional discussion on the varied uses of ETFs
- Added material on the importance of risk tolerance questionnaires and the requirements of a quality questionnaire
- Expanded discussions of commodities and precious metals
- New material on Master Limited Partnerships
- Cross referenced to the best-selling National Underwriter titles, 2013 *Tax Facts on Investments* and 2013 *Tax Facts on Insurance & Employee Benefits*, which provides added depth and information.

Authored by Donald Cady, J.D., LL.M., CLU, *Field Guide to Estate Planning, Business Planning & Employee Benefits* reflects his expertise and ease in communicating planning concepts and techniques to final professionals of all levels.

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