



# How to Open & Operate a Financially Successful Personal Financial Planning Business (How to Open and Operate a Financially Successful...)

*Martha Maeda*

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# How to Open & Operate a Financially Successful Personal Financial Planning Business (How to Open and Operate a Financially Successful...)

*Martha Maeda*

## **How to Open & Operate a Financially Successful Personal Financial Planning Business (How to Open and Operate a Financially Successful...)** Martha Maeda

Millions of Americans every year have troubles with their finances. They turn to experts in droves, asking for help in filing their taxes, consolidating their debt, or just planning how they will pay their bills and invest their retirement funds.

This book was written for anyone who has ever wanted to dip his or her foot into financial planning but did not know where to start. You will learn the fundamental basics of financial planning, starting with the very process that most planners use to organize their own finances. You will learn how to organize financial statements and to create plans and how to properly manage taxes to great effect. You will learn how to manage basic assets such as cash, savings, home equity, and auto- mobiles. You will learn how to effectively manage credit and how to deal with insurance including life insurance, health insurance, and property insurance.

Whether you will be operating out of your home or you are looking to buy or rent office space, this book can help you with a wealth of startup information, from how to form and name your business to deciding if this will be a joint venture or if you would rather work solo. You will learn how to build your business by using low- and no-cost ways to satisfy customers, and also ways to increase sales, have customers refer others to you, and thousands of excellent tips and useful guidelines.

This complete manual will arm you with everything you need, including sample business forms; contracts; worksheets and checklists for planning, opening, and running day-to-day operations; lists; plans and layouts; and dozens of other valuable, timesaving tools of the trade that no business owner should be without. For all prospective financial planners, this guide will give you a complete walkthrough and timeline of what you need to accomplish to be effective.

The companion CD-ROM is not available for download with this electronic version of the book but it may be obtained separately by contacting Atlantic Publishing Group at [sales@atlantic-pub.com](mailto:sales@atlantic-pub.com).

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