DESCRIPTION

An in-depth examination of today's most important wealth management issues

Managing the assets of high-net-worth individuals has become a core business specialty for investment and financial advisors worldwide. Keeping abreast of the latest research in this field is paramount. That's why Private Wealth, the inaugural offering in the CFA Institute Investment Perspectives series has been created. As a sister series to the globally successful CFA Institute Investment Series, CFA Institute and John Wiley are proud to offer this new collection. Private Wealth presents the latest information on lifecycle modeling, asset allocation, investment management for taxable private investors, and much more. Researched and written by leading academics and practitioners, including Roger Ibbotson of Yale University and Zvi Bodie of Boston University, this volume covers human capital and mortality risk in life cycle stages and proposes a life-cycle model for life transitions. It also addresses complex tax matters and provides details on customizing investment theory applications to the taxable investor. Finally, this reliable resource analyzes the use of tax-deferred investment accounts as a means for wealth accumulation and presents a useful framework for various tax environments.

ABOUT THE AUTHOR

Stephen Horan, PhD, CFA, manages professional education and private wealth management content for CFA Institute members. Dr. Horan has served CFA Institute as both an editorial board member and abstractor for the CFA Digest and as an ad-hoc reviewer for the Financial Analysts Journal. He holds a PhD in finance from the State University of New York at Buffalo, publishes...
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