DESCRIPTION

A Client-Centered approach to Financial Planning Practice built by Research for Practitioners

The second in the CFP Board Center for Financial Planning Series, Client Psychology explores the biases, behaviors, and perceptions that impact client decision-making and overall financial well-being.

This book, written for practitioners, researchers, and educators, outlines the theory behind many of these areas while also explicitly stating how these related areas directly impact financial planning practice. Additionally, some chapters build an argument based solely upon theory while others will have exclusively practical applications.

- Defines an entirely new area of focus within financial planning practice and research: Client Psychology
- Serves as the essential reference for financial planners on client psychology
- Builds upon and expands the body of knowledge for financial planning
- Provides insight regarding the factors that impact client financial decision-making from a multidisciplinary approach

If you’re a CFP ® professional, researcher, financial advisor, or student pursuing a career in financial planning or financial services, this book deserves a prominent spot on your professional bookshelf.
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