



The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Financial)

Mark C. Tibergien, Kimberly G. Dellarocca

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The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Financial) Mark C. Tibergien, Kimberly G. Dellarocca **A guide for financial advisors who are ready to embrace new opportunities**

The Enduring Advisory Firm is a book for the forward-thinking financial advisor. Financial advisement is traditionally a hands-on field, so few in the industry feel threatened by the shifting social and technological landscape. In this book, Mark Tibergien—routinely named one of the most influential people in the financial services world—and Kim Dellarocca make a compelling case for taking a closer look at technology and other big-deal industry trends in order to move the business of financial advice into the next stage of its evolution.

Combining a facts-based approach with case studies and examples from the field, *The Enduring Advisory Firm* will ignite your imagination by demonstrating practical strategies for attracting clients and streamlining operations. Today's smart practice managers are focusing on emerging topics like the needs and expectations of the Millennial generation, mobile and interactive technologies, and growth planning. Responding thoughtfully to these trends, with the help of this book, could propel your financial advising business toward a more successful future.

- In-depth discussion of trends and forces that you can harness to reshape your financial advisement business
- Case studies and examples showing how to navigate the most difficult business decisions
- Innovative ideas for process improvement, more fruitful client interactions, and sustainable growth
- Tips and insight for attracting Millennial clients and talent by leveraging new technologies

The Enduring Advisory Firm will inspire financial advisors, managers, and executives to branch out in ways that will lead to measurable growth. With a newfound focus on the evolution of your business, you might be surprised at where change takes you.



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