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Questions Great Financial Advisors Ask... and Investors Need to Know PDF



by Alan Parisse : **Questions Great Financial Advisors Ask... and Investors Need to Know**

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Description :

PDF-5a3fe | A financial advisor recounts an interview with a recently retired physician who planned an enjoyable—and costly—retirement. The doctor wanted his entire portfolio in bonds, which was far too conservative to maintain the lifestyle he and his wife had planned. In the advisor's words: "This fellow was a bit of a know-it-all, and I wasn't getting through. Finally I asked him, 'Doctor, how will ... *Questions Great Financial Advisors Ask... and Investors Need to Know*

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