



# Intergrated Wealth Management: The New Direction for Portfolio Managers, 2nd Edition

*Jean LP Brunel*

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Integrated Wealth Management emphasizes how you, the high-net-worth portfolio manager must follow a different set of rules, from your institutional counterparts. The author gives you the "step by step" tools necessary to make long term decisions that will be in the best interest of your clients. Private wealth management is a new, discrete discipline, and not just a variation on the traditional investment management theme. The factors necessitating this new discipline include taxation, using options and risk strategies, individual cash flow needs and investor psychology. As an investment advisor, you need to challenge conventional wisdom or you will be putting your client's legacy at risk.

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