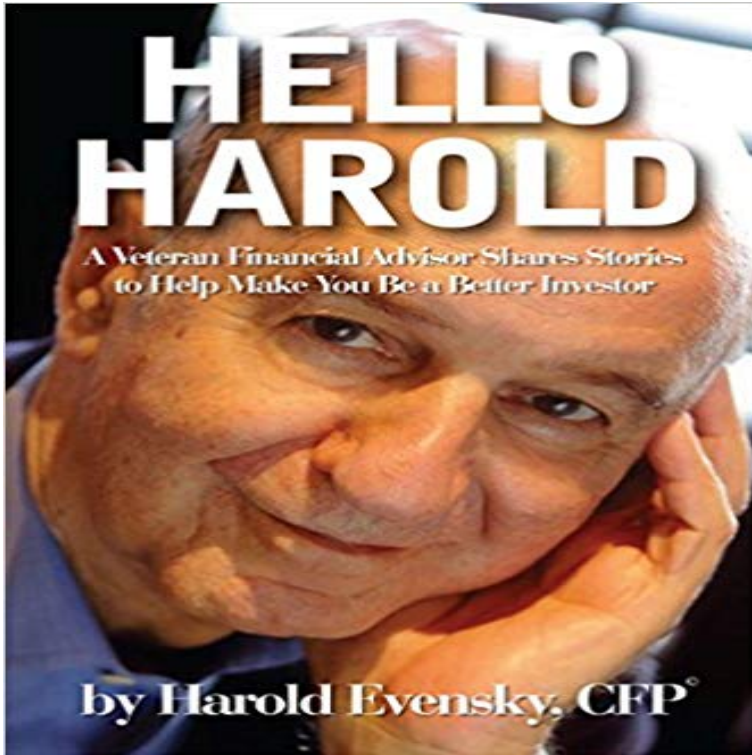


# Hello Harold: A Veteran Financial Advisor Shares Stories to Help Make You Be a Better Investor



Welcome to Hello Harold (thats me, Harold Evensky). Ive been a practicing financial planner for over three decades; financial planning is my avocation as well as my vocation. Ive had the privilege of participating in the growth of my profession, serving on the national Board of the International Association for Financial Planning, as Chair of the Certified Financial Planning Board, the International Certified Financial Planning Board of Standards, as well as on advisory boards for Charles Schwab and TIAA-CREF. In those three decades plus, Ive seen a great many changes, not only in the markets but also in how investorsand their advisorsrespond to them. Some of those responses make very little sense. Financial planning is a powerful tool that can help you develop and maintain the quality of life you want. Unfortunately, theres a ton of noise and nonsense foisted on investors that can undermine their financial success. Maybe youre one of the many unlucky folks whove tried using a broker or financial advisor and wound up with one of the few less than ethical ones who had you invest in easy-answer funds that did more for the advisors bottom line than yours. Maybe you decided to go it alone. Unfortunately, investing is not a simple task and without a grasp of the fundamentals many investors wind up making costly mistakes. Although there are innumerable booksmany of them very gooddesigned to help you invest wisely, many are too long, too technical, too boring, too commercial, or too simplistic to hold the readers attention. So its my turn. I decided my book would be just rightnot too long, not too short, not too technical, not too simplistic, not commercial and, most important, fun to read. Hello Harold gives you the foundation you need to navigate the markets and plan your financial future. I take you along with me on phone calls and meetings, conferences and classrooms,

and let you eavesdrop on my thoughts, conversations, and brainstorming sessions with clients, colleagues, and students. I introduce you to actionable concepts that will make you a far better investor, with a sound plan for your future. You may even have some fun along the way. Unlike most books you're familiar with, don't feel obligated to move from page one through to the end. Each chapter stands on its own, so you can skip and jump to your hearts content, chasing subjects you find of interest in any order that appeals to you. No matter where you land, whether it's cash flow or market timing or taxes or any of a myriad of essential topics, you're likely to find something you hadn't considered before in quite that way. Each chapter is designed to give you insights that will improve your financial bottom line and your chances of achieving your financial goals.

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Dec 15, 2015. by Harold Evensky **Hello Harold: A Veteran Financial Advisor Shares Stories to Help** Hello Harold: A Veteran Financial Advisor Shares Stories to Help Make You Be a The Financial Advisors Guide to Managing and Investing Client Assets (CFA An Advisers Guide for Funding Boomers Best Years (Bloomberg Financial). **Net, Net, Net: Expenses, Taxes and Inflation Can Eat Your Nest Egg** That's how all too many investors make their investment decisions. Even before picking the best stocks and bonds, you have to decide how . Hello Harold: A Veteran Financial Advisor Shares Stories to Help Make You Be a Better Investor. **The Human Element of Financial Planning - ResearchGate** Harold Evensky CFP , AIF Chairman Clay: Unlike the actively managed fund, an index manager makes no decisions about what [See Chapter 13, The Three Ps of Investing, for more information.] . 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