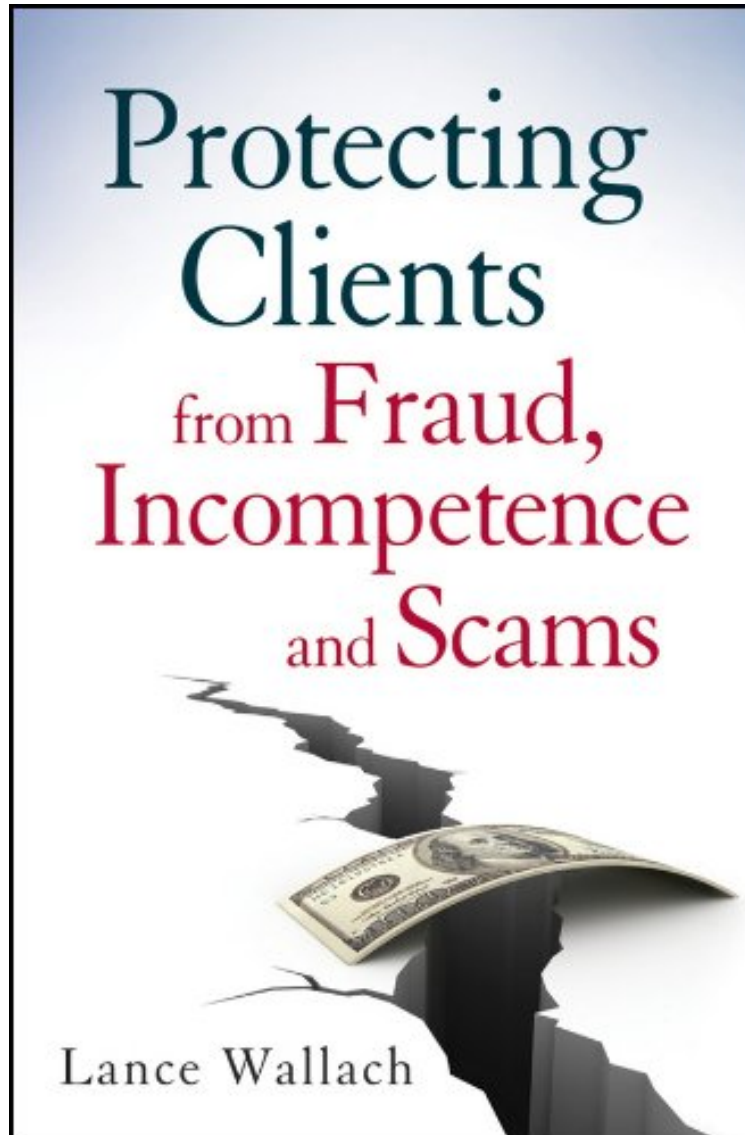


## Protecting Clients from Fraud, Incompetence and Scams

*Lance Wallach*

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**Lance Wallach : Protecting Clients from Fraud, Incompetence and Scams** before purchasing it in order to gage whether or not it would be worth my time, and all praised Protecting Clients from Fraud, Incompetence and Scams:

1 of 2 people found the following review helpful. Excellent BookBy Alyson LuftigAs a law student in my final semester, I found this book incredibly helpful and informative regarding important subjects that I will likely have to deal with in the future. Every professional should know how to protect their clients from finance difficulties and make their transactions as painless as possible.I wish this book had been a supplement in my Federal Income Tax Class. I highly reccommend it to accounting, insurance, legal, and other types of professionals.

Protect your clients – and yourself – from all kinds of financial chicanery and stupidity with this vital new book. It doesn't matter if a financial error was made because of malice or ignorance – the end result is that you lose money. Luckily, you don't have to sit idly and take it. If you have *Protecting Clients from Fraud, Incompetence and Scams*, you can identify and avoid the dysfunctional sectors of the financial industry, steer clear of the fallout from the Madoff Era, and guide your clients to real, healthy, sustainable returns. This powerful book pinpoints dysfunctional sectors within the financial industry and offers advice against frauds and scammers. Shows how a team approach to asset management can ward off financial predators. Offers practical strategies and tools to combat client risk for Risk and Asset Management. Offering insightful information to protect your clients from all sorts of frauds and incompetence, this essential guide equips you with tips and techniques to spot the red flags of fraud and prevent it before it starts.

From the Inside Flap: Every financial expert out there knows that bad faith and bad planning can take down even the biggest firms, wiping out billions of dollars of value in an instant. Whether it's internal fraud, a scammer, or an incompetent planner that takes your client's cash, the bottom line is: that money is gone and the loss should have been prevented. Filled with authoritative advice from financial expert Lance Wallach, *Protecting Clients from Fraud, Incompetence, and Scams* equips you as an accountant, attorney, or financial planner with the weaponry you need to detect bad investments before they happen and protect your clients' wealth—as well as your own. Sharp and savvy in its frank, often humorous, and authoritative examination of financial fraud and mismanagement, you'll learn about the dysfunctional sectors in the financial industry and: Protecting your retirement assets Asset protection basics Shifting the risk equation: insurance maneuvers Reevaluating existing insurance What financial advisors and insurance agents "forget" to tell their clients The truth about variable annuities What you must know about life settlements The smart way to approach college funding The news for the past two years has been filled with gloom and dangers: swindles, Bernie Madoff, rip-offs, and the collapse of Bear Stearns and Lehman Brothers. But the party's over, and with that era done, it's more important than ever for you to perform due diligence on all financial maneuvers affecting the money you oversee and provide your clients with assurance in the form of practical solutions for risk and asset management. A pragmatic blueprint for identifying trouble spots you can expect and immediately useful solutions, *Protecting Clients from Fraud, Incompetence, and Scams* equips you with the resources, strategies, and tools you need to effectively protect your clients from frauds and financial scammers.

From the Back Cover: How much money did your clients lose in the Great Recession? It doesn't matter if a financial error was made because of malice or ignorance. The end result is the same: You. Lost. Money. Luckily, you don't have to sit idly and take it. *Protecting Clients from Fraud, Incompetence, and Scams* will help you identify and avoid the dysfunctional sectors of the financial industry, steer clear of the fallout from the Madoff Era, and guide your clients to real, healthy, sustainable returns. This powerful book: Pinpoints dysfunctional sectors within the financial industry and offers advice against frauds and scammers Shows how a team approach to asset management can ward off financial predators Offers practical strategies and tools to combat client exposure to risk and asset management Expertly arms you with the tools to eliminate future frauds and reduce fraud losses Identifies trouble spots to avoid with solutions you can put to work right away Helps you provide your clients with assurance in the form of practical solutions for risk and asset management Financial fraud and incompetence can't come to the party anymore! With insightful information to protect your clients from losing money, *Protecting Clients from Fraud, Incompetence, and Scams* is the book of the hour, equipping you with tips and techniques to spot the red flags of fraud and prevent it before it starts.

About the Author: LANCE WALLACH, CLU, CHFC, is a leading speaker on accounting and taxation topics and the author of numerous AICPA CPE exam publications. In addition to developing CPE courses, he is also a member of the AICPA faculty of teaching professionals, and has been featured in the *Wall Street Journal*, the *New York Times*, *Bloomberg Financial News*, *NBC*, *National Public Radio's All Things Considered*, and other radio talk shows. Mr. Wallach is listed in *Who's Who in Finance and Business*.