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2007 Software Survey

By Joel P. Bruckenstein

What you're using, what you're not and how the right programs can improve your efficiency.

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Subprime Truths and Consequences

By Elizabeth O'Brien

The continuing credit crunch spotlights the perils of leverage. How should your clients respond?

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The Credit Crunch

By Jerry Webman

A Wall Streeter explains what happened.

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COLUMNS

The Elite Advisor: Closing the Gap

By John J. Bowen Jr.

Financial advisors often know what they should do to be more successful but never actually do it. They need to close that gap.

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Industry Insight: Easy Efficiencies

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The Elite Advisor: Closing the Gap

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Managed Money: Goin' Golfin'

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By Jeanne Lee

The Boston behemoth is introducing new, integrated technology that promises practice management nirvana. Will it captivate and capture the RIA market?

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Fund Manager Profile: Naughty or Nice

By Jeanne Lee

HIGH NET WORTH

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By David E. Adler

Are your clients too rich to need long-term-care insurance?

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Estate Planning: Your Prudent Practice

By Martin M. Shenkman

Practice Profile: The Listener

By Jim Grote

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DEPARTMENTS

THE PRACTICE

Integration Ardor

By Kevin Barr

Advisors must be cautious in their attempt to achieve total technology integration, so they don't end up worse off for their trouble.

Get With The Program

By Marie Swift

THE CLIENT

Annuities, Revisted

By Ilana Polyak

Advisors who once sneered at annuities are now realizing that they could be a magic bullet.

The Giving Tree

By Donald Jay Korn

Heirs With Special Needs

By Barbara H. Cane

THE PORTFOLIO

Hedge Funds Redux

By Donald Jay Korn

Despite a midsummer month's nightmare, hedge funds are still pointing to successful records and raking in money.

In Search of Yield

By Douglas R. Bond

MY WORD

Are You a Dinosaur?

By Joseph J. Duran

As financial advice changes, it's wise to heed this basic rule of nature.

THE DATA

VA Milestones

By Frank O'Connor

The second quarter results are in, with variable annuities setting a new record for sales.

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