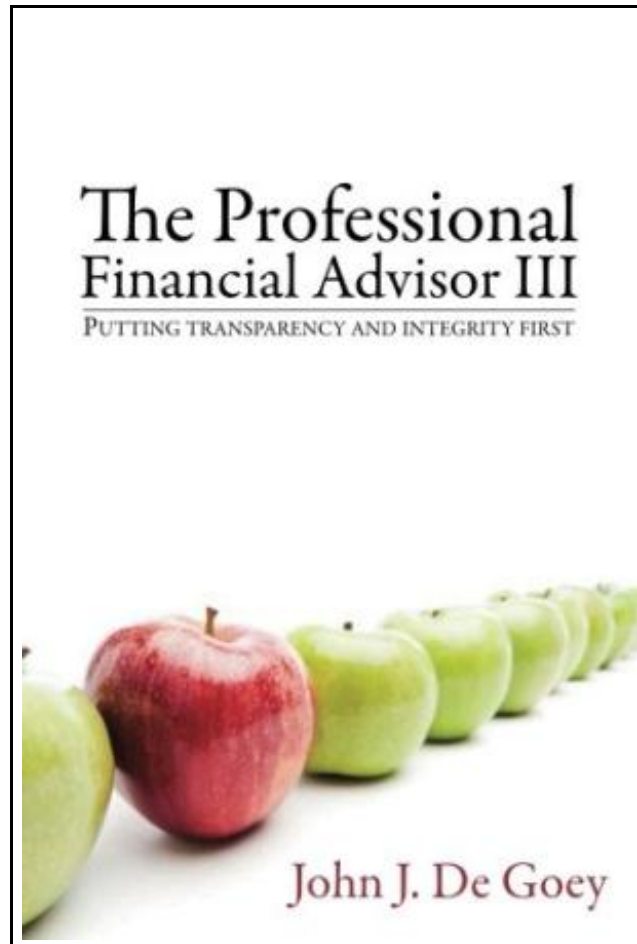


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## THE PROFESSIONAL FINANCIAL ADVISOR III: PUTTING TRANSPARENCY & INTEGRITY FIRST



Insomniac Press. Paperback. Book Condition: new. BRAND NEW, The Professional Financial Advisor III: Putting Transparency & Integrity First, John J. De Goey, Sweeping changes are transforming the financial services industry. More and more Canadians are turning to investment advisors to help them achieve lifelong financial security, but how do we know who to trust with our money and our retirement plans? All too often, argues John DeGoey, an advisor who appears to be a dispassionate professional giving objective advice turns out to be a salesperson, recommending a product because of the size of the embedded commission. Where does the future lie for financial service professionals and their clients? DeGoey favours a STANDUP approach -- Scientific Testing and Necessary Disclosure Underpin Professionalism, his formula for the ethical delivery of financial services. In this third edition of his groundbreaking book, DeGoey surveys the changes so far and compares the practices of financial advisors with other professionals such as lawyers, dentists and physicians. He takes issue with the current wisdom that privileges active management -- constant trading and rebalancing of an investment portfolio, with the associated commissions for the broker or trader, combined with attempts at stock picking and market timing -- over passive management or trust in the efficiency of the market. Financial Service Providers should charge their clients a set fee for advice, regardless of the products that form an individuals portfolio, says DeGoey, thereby making themselves the ethical professionals they claim to be.



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