



# Retirement Portfolios, Set: Theory, Construction, and Management

*Michael J. Zwecher*

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# Retirement Portfolios, Set: Theory, Construction, and Management

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**Retirement Portfolios, Set: Theory, Construction, and Management** Michael J. Zwecher  
**A comprehensive set of retirement portfolio guidance for finance professionals**

Retirement is one of the most important parts of the financial planning process. Yet only two percent of financial advisors describe themselves as competent in retirement planning.

Constructing a retirement portfolio is viewed as a difficult endeavor, and the demands facing financial advisors responsible for this task continue to grow. The *Retirement Portfolios Set*—comprised of a book and workbook—will help you develop the essential skills necessary to excel at this discipline and give you a better understanding of the entire process. The book outlines how to create a portfolio that will provide income, continue to generate growth, and protect assets from disaster. While the workbook offers you a wealth of practical information and exercises that will solidify your understanding of the tools and techniques associated with this discipline.

- The book Examines how portfolios should be prepped in advance so that the transition from "working" portfolio to retirement portfolio is smooth and seamless
- The workbook will test your knowledge of the information addressed in *Retirement Portfolios*, before you put it to work in real world situations
- Details the differences in managing a retirement portfolio versus managing portfolios during asset accumulation years

The ability to create retirement portfolios and manage their risks are skills you must possess to be an effective financial advisor. *Retirement Portfolios Set* will help you achieve this elusive goal.

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