



Wealth Management Unwrapped

Charlotte B. Beyer

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The FIRST book to read before you hire – or fire – your advisor, **Wealth Management Unwrapped** is a comprehensive guide for both the newly wealthy and the experienced investor.

In her new book, Wall Street veteran and Institute for Private Investors (IPI) founder Charlotte Beyer sheds light on the complex wealth management industry, outlines the responsibility that all investors have as ‘CEOs’ of their own wealth, and equips them with the tools to effectively manage their money.

“Short. Candid. Fun and easy reading. Full of good advice and useful insights.”

—Charles D. Ellis, author *Winning the Loser’s Game*

“Beyer’s advice is occasionally blunt—and consistently useful. You will improve your chances of success if you find an advisor who provides the brand of well-informed straight talk that characterizes this book.”

—Martin Fridson, *Barron’s*

“A masterpiece that every investor should read and own.”

—Lloyd Hascoe, Hascoe Associates

Wealth Management Unwrapped is the accumulation of Beyer’s extensive knowledge and experience observing high-net-worth investors and family offices. She strips away industry jargon, and empowers readers to find and build partnerships with the right financial advisors.

Many of the questions *Wealth Management Unwrapped* will answer:

- What kind of investor am I?
- What is the difference between an advisor and a money manager?
- How do I know whom to trust?
- Why should I care about conflicts of interest?
- How do I know if I might not prefer being a do-it yourself investor?
- What are the best questions to ask when interviewing an advisor?
- How do I know if I can trust the firm’s disclosure on fees?

About the Author

After 20 years on Wall Street, Charlotte B. Beyer founded the Institute for Private Investors (IPI) in 1991 to help improve the relationship between wealthy investors and their financial advisors. Then in 1999 she collaborated with The Wharton School to create the first private wealth management curriculum for families in the country, a program she continues to teach twice a year.

Beyer also launched the Investor Education Collaborative in 2004 to continue to spread the message of IPI, where she served as CEO for 21 years until her retirement in 2012. In 2007, she was the first woman honored with a Lifetime Achievement Award at *Institutional Investor’s* annual High-Net-Worth Industry Awards.

A graduate of Hunter College, Beyer also attended the University of Pennsylvania and the Stern/NYU Graduate School of Business Administration. She is past President of the Board of Trustees of the Westover School, an all-girls school, and funded the Principle Quest Foundation, a private nonprofit foundation working to support innovative education and mentoring programs for women. From 2009–2012 Beyer served as Vice Chair of the Board of Trustees of the Museum of American Finance. She currently serves on the global association board of 100 Women in Hedge Funds and on the Advisory Board of Institutional Investor's *Journal of Wealth Management*.

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