



Financial Independence (Getting to Point X): An Advisor's Guide to Comprehensive Wealth Management

John J. Vento

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Discover the ten key issues to achieving your financial goals and how to use them to realize your dream of financial independence

From saving to purchase a first car, to putting kids through college to planning for retirement, to preserving your estate for your loved ones, our financial goals change from one stage of life to the next. While those goals and the challenges we face in achieving them may differ, all of them have certain things in common. Saving, budgeting, managing debt, minimizing taxes and living within your means. These are a few of the 10 Key Wealth Management Issues which come into play (to varying degrees) when working toward specific financial goals. But there's one goal for which success relies on all ten keys coming together in perfect harmony: financial independence, also known as "Point X." No matter how you define it—whether it's a retirement income of \$25,000 a year, or an estate worth \$250 million—your future financial independence requires that you deal effectively with all ten key issues. And now this book shows you how to get it done, along with the guidance of a trusted advisor.

- Supplies you with a complete roadmap for arriving at "Point X," financial independence with key milestones and important twists and turns clearly defined
- Identifies the 10 key wealth management issues and offers priceless advice and guidance on negotiating each on your road to financial independence
- Provides you with both success and failure stories so you can learn from others' real life experiences
- Provides you with tax planning facts and strategies within the wealth management issues that will show you how to minimize your most significant expense and at the same time maximize your savings on the road to your "Point X"

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