



The History of Financial Planning: The Transformation of Financial Services (Wiley Finance)

E. Denby Brandon, H. Oliver Welch

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The first book to provide a comprehensive history of the financial planning profession

The financial services field has been revolutionized in the last quarter of the twentieth century by the financial planning profession. So much has happened in so little time that it has been difficult to keep up with the events and key players that make up the world of financial planning. *The History of Financial Planning* is the first book to provide a comprehensive history of the profession.

Backed by the Financial Planning Association, *The History of Financial Planning* offers a clear overview of the industry and how it has grown and changed over the years. This book chronicles the history of the profession, with explanations of how the financial planning movement has grown beyond the United States to other countries-particularly in the last fifteen years. The book also demonstrates how the work of key researchers, such as Dr. Daniel Kahneman, Vernon Smith, and Amos Tversky, has influenced the rise of the financial planning profession

- Names "four initial engines of growth" that contributed to the success of financial planning
- Reveals the moments and key players that define the history of financial planning
- Discusses the emergence of the Financial Planning Association (FPA)

The financial planning field has a rich history, and with this book as your guide, you'll quickly discover how it has evolved over the years.

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