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BANK INVESTMENT CONSULTANT ONLINE

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FEATURES

Financial Planning: A Time to Give

By Rob Garver

Whether it's part of an estate plan or just plain altruism, advisors can add value to client relationships by helping investors make tax efficient charitable donations.

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Product Insight: Investing for Good

By David Lindorff

Socially responsible investing is going mainstream as an increasing number of clients want to make their investments mirror their ethics.

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Wealth Management: Learning to Love Lawyers

By Barbara H. Cane

Most of your clients will eventually need some kind of estate planning. Here's how you can build a mutually rewarding relationship with outside lawyers.

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Branching Out: Ten-Gallon Growth

By Dave Lindorff

Texas-based reps find opportunities to sell in small towns and big cities alike.

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An advertisement for Vanguard MEGA CAP 300 ETFs. It shows three fund logos: MGC (MEGA CAP 300), MGK (MEGA CAP 300 GROWTH), and MDV (MEGA CAP 300 VALUE). Below the logos is a call to action: "Click here to learn more about low-cost ETFs." At the bottom, there is a disclaimer: "Obtain prospectus including potential risks. All marks are the exclusive property of their respective owners. Vanguard Marketing Corp., Distributor © 2007. The Vanguard Group, Inc. All rights reserved. US Pat. No. 6,879,964, B2." The Vanguard logo and NYSE listing are also present.

Up Front News

Banks, Pick Up Your Game

By Howard J. Stock

Despite all of the industry chatter about retirement income planning, banks are significantly behind the curve in capturing assets of their core demographic: the mass affluent.

Capitalizing on Charitable Urges

By Howard J. Stock

Your altruistic clients are missing a chance to save while giving to charity, according to a new Fidelity report.

Brokerage Escapes the Suprime Mess

By Howard J. Stock

It's all over the media—the subprime crisis is hitting banks hard with huge write-downs, falling stock values, and significant job cuts. Is it time to panic?

U.S. Bancorp Joins the UMA Fray

by Steve Garmhausen

U.S. Bancorp has become the latest large bank to roll out a unified managed account platform.

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