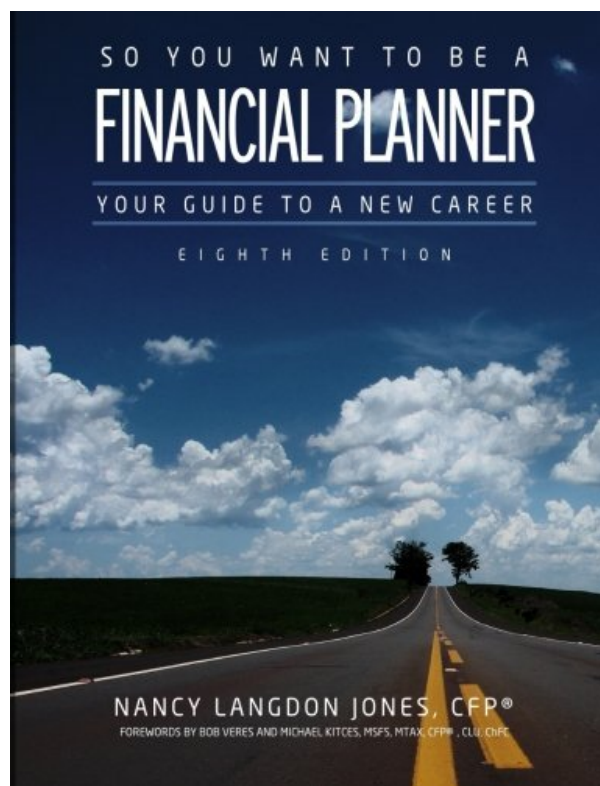
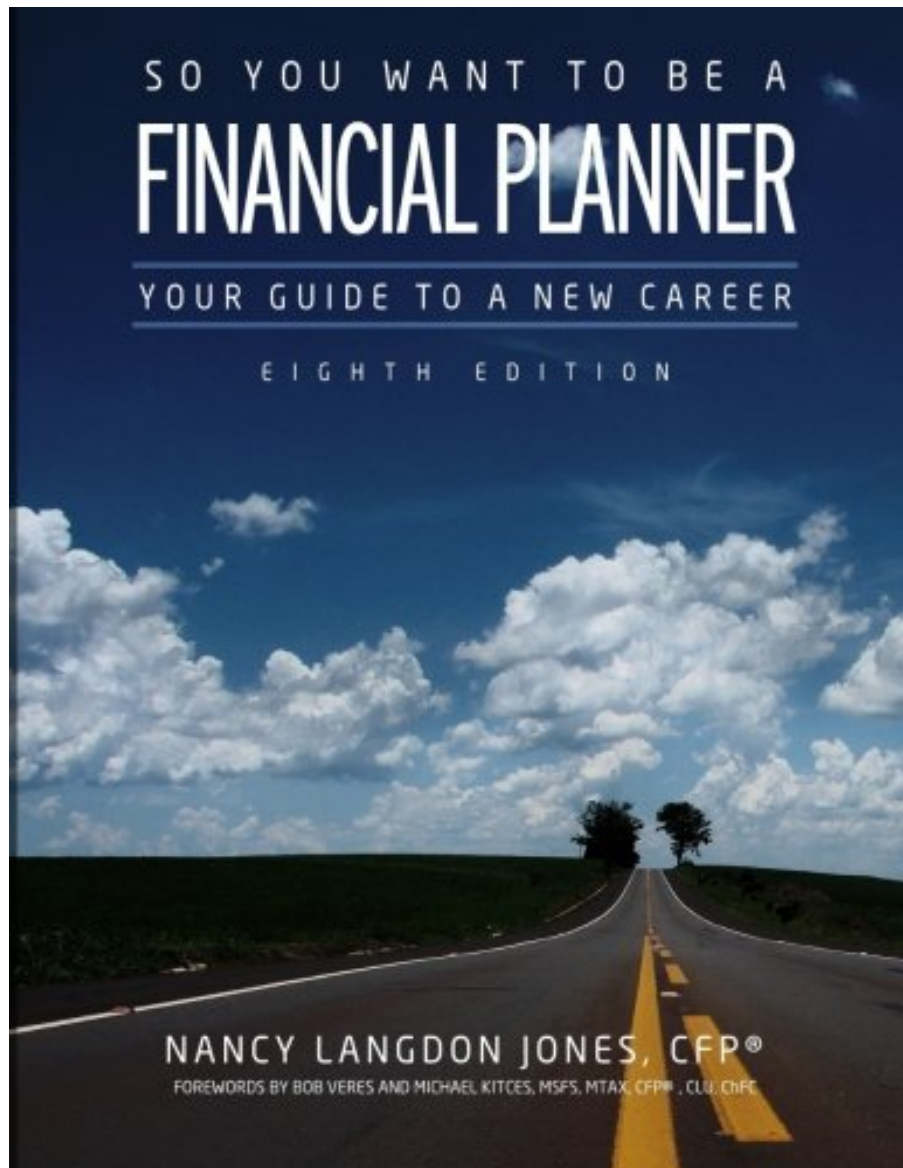


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About the Author

In the early eighties, Nancy was a dissatisfied Realtor, having serious concerns with the proliferation of “creative financing” among lenders. When the College for Financial Planning presented a program for Realtors about a new profession called “financial planning,” she was intrigued and enrolled in the CERTIFIED FINANCIAL PLANNER™ (CFP®) course in September of 1983. Six months into the CFP® program, she left real estate to begin her full time career in financial planning. Her instructors agreed that the only way to thrive as a financial planner was to sell commissioned products. For several years she was affiliated with a Broker/Dealer and prepared tax returns on her own. When she learned that she could actually write financial plans for a fee, she established an independent practice to prove that selling on commissions was not a prerequisite to success, which led to a successful twenty year career. She applied for a position as adjunct faculty with the College for Financial Planning (1986-1994) and taught every course in the required CFP® curriculum while earning her Masters in Financial Planning and the designation Accredited Tax Advisor from the same institution. She volunteered for the CFP Board Item Writing Committee (1994-1998) and wrote multiple-choice questions for the series exams. That led to participation writing Case Study questions, questions for the CFP® Comprehensive Exam, and, in 1999, appointment to the North American Securities Administrators Association Investment Advisor Competency Exam Advisor Council. In 1995, she began posting on Financial Planning Interactive and shortly thereafter was asked to help moderate their “Getting Started” discussion boards. After answering the same questions repeatedly, she realized the need for a comprehensive publication on the topic of how an individual can get started as a financial planner. Today, she spends hours every month corresponding with individuals asking for guidance in making a career move to financial planning. In 1999, and again in 2000, she was a panelist for the Los Angeles Times’ Investment Strategies Conference. In 2002, Nancy was named one of the Most Influential People in the Profession by readers of Financial Planning Magazine, and is an American Business Women’s Association 2003 Top Ten.

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Finally, together in one place, a comprehensive step-by-step process for launching your career as a financial planner. Here is everything you need to know – from getting the right credentials to getting the right clients. Over the next few decades, billions of dollars will be changing hands as millions of Baby Boomers retire. Learn how you can play an important role in ensuring the financial health of future generations! The 8th edition of *So You Want to Be a Financial Planner* is chock full of actionable tips to jump-start your career, including dozens of valuable new resources from proven business models and state of the art technology. Over 100 current links point the way to blogs and websites of giants in the industry, putting you on the cutting edge of today's thriving financial planning profession. Follow updated case histories from more than two dozen successful financial planners. You'll see yourself in one of their stories and know the steps to take to start your journey, while circumventing the mistakes they made. Learn which organizations will enhance your career, and which to avoid. Discover how to navigate the regulatory jungle with usable 'how to' guidance, including specific sources to get you educated, registered and up and running a profitable business as soon as possible.

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Must read for those interested in becoming a financial planner

By Robert A. Moore

The financial planning profession is a wonderful, much-needed one -- but for far too long, there hasn't been much direction or advice for next generation talent interested in pursuing a financial planning career. There aren't widely-available answers to the tough questions about how to start or get your foot in the door as an advisor who really cares about financial planning for clients they care about. Resources are scarce and it's not always easy to find a mentor to help understand how to break into the profession and succeed in the industry.

With *So You Want to Be a Financial Planner*, Nancy Langdon Jones covers just about every angle of the topic that anyone looking to enter this industry will want to get familiar with. Nancy provides answers, ideas, and solutions for people eager to start down this career track, and gives countless resources to follow up on when you're ready to ask more advanced questions and dive deep into complicated topics like starting your own firm.

This is a must-read for anyone considering a career change, looking to transition to financial planning from another position within the financial industry, or currently pursuing higher education in financial planning. I'm excited Nancy has put together this comprehensive guide -- it gives future financial planners the excellent start they need to succeed.

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Your Foundation to a Career with Purpose!

By Jasonjh7

This is THE guide if you're thinking about switching career fields to becoming a Financial Planner. I personally bought this book about 2 editions ago and continue to get the updated versions. Since purchasing, I have completed nearly all the coursework for my CFP certification and right now I'm in the process of getting registered with the state to start my own RIA. It's been a long journey but Nancy's book has given me honest and clear guidance every step of the way. Even after 2 years of having this guide, just last week I brought it back out to get some help on a subject I needed help with. As someone who has a library of books on entering and being successful in this field, I can say you will not get a more honest, kind author in Nancy Langdon Jones to help you get started with your journey.

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