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Goal-Based Wealth Management in Practice

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Abstract

Though goals-based wealth management is certainly not a radically new discipline, it has recently assumed a more important role within the private wealth management industry. Two discrete factors probably stand behind this development: a change in client perceptions of risk after the 2008 market melt-down and the publication of the seminal piece by Das, Markowitz, Scheid, and Statman. This article starts with a review of the key issues

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which families typically face when dealing with wealth planning, then discusses a framework which allows advisors to consider financial, estate, and investment-planning needs, shows the practical considerations associated with the process and concludes with a brief discussion of the major business challenges that still need to be addressed.

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