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For over a decade, The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets has provided financial planners with detailed, step-by-step guidance on developing an optimal asset allocation policy for their clients. And, it did so without resorting to simplistic model portfolios, such as lifecycle models or black box solutions.

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Lance is the co-founder of The New Albany Wealth Management Group at Morgan Stanley. He works with executives, entrepreneurs and successful individuals and their families to uncover opportunities to help create meaningful growth. Lance believes that effective wealth management means providing thoughtful advice for every decision involving money.

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