Journal of Wealth Management

Description: The Journal of Wealth Management (JWM) provides original research and practical analysis on the preservation and growth of the assets of high-net-worth investors and family offices. It addresses the investment concerns of wealthy families and keeps you abreast of the latest investment strategies in private asset management.

You get practical tools to:

- Generate high after-tax returns while mitigating volatility
- Balance tax and risk concerns
- Optimize asset allocation and money management selection
- Determine hedge fund allocation and measure performance
- Use estate planning to enhance cross-generational wealth creation

You get four print issues a year plus online access to archived articles.

JWM is read by high-net-worth investors and their investment managers, private bankers, executives in family offices and advisory firms, estate planners, tax accountants, and hedge fund and private equity managers.

The Journal of Wealth Management (JWM) is the only peer-reviewed journal devoted exclusively to original research and practical guidance for high-net-worth investors and family offices.

Coverage includes:

- Behavioral Finance: the way risk is perceived and measured
- Investment Policy -- Formation: issues of asset-allocation and selection in the context of maximizing after-tax wealth
- Investment Policy Execution: the impact of tax-awareness on a manager stable comprising different styles and products
- Tax-Aware Investing: issues of maximization of after-tax wealth and optimization frameworks
- Interdisciplinary Issues: the interplay between investment and estate planning
- Performance Measurement: how after-tax returns are computed, assessed, or measured

Readers include:

- Family Offices
- Private Banks/Trust Companies
- Hedge Fund Managers
- Estate Planners
- Financial Planners (for taxable portfolios)
- High-End RIAs
- Wealth Advisors
- Family Business Consultants
- High-Net-Worth Investment Managers
- CPAs/Tax Accountants/Accounting Firms
- Wealthy Families
- Small Business Owners
- Charitable Organizations
- Pension Plans/Funds
- Philanthropic Advisors
- Professional Intermediates
- Luxury Providers
- Officers of Family-Owned Advisory Firms
- Insurance and Risk Management Specialists
Contents:

Sample features from recent editions include:

- Differences and Similarities in Family Governance and Educational Needs across Geographies
- Portfolios for Investors Who Want to Reach Their Goals While Staying on the Mean–Variance Efficient Frontier
- Perspectives from the Literature of Private Wealth Management
- The Three Forms of Governance: A New Approach to Family Wealth Transfer and Asset Protection
- Younger Generations' Investing Behaviors in Mutual Funds: Does Gender Matter?
- Responsibility and Accountability to the Family: Teaching Confidentiality to the Next Generation in a Social Media Society
- Not All Advisors Are the Same: How Can You Tell the Difference?
- Finding and Retaining the Right Advisor for a Family and Its Family Office
- Examining the Use of Investment Policy Statements
- Historical Performance of Asset Location Strategies and Its Implications for Investors' Retirement Portfolios
- Investor Education: What's Broken and How to Fix It
- Client Relationships and Family Dynamics: Competencies and Services Necessary for Truly Integrated Wealth Management
- The Institute for Wealth Management Standards and the Case for Private Wealth Management Standards
- From Single-Family Office to Multifamily Office
- Strategies for Maximizing Social Security Benefits: A Reply
- Getting Off the Fence: A Dynamic Wealth Transfer Strategy to Solve the Procrastinator's Dilemma
- Green Recovery: How Are Environmental Stocks Doing?
- Dynamic Consumption and Portfolio Decisions with Time Varying Asset Returns
- Do Mauritians Have Altruistic Bequest Motives?
- From Entitlement to Stewardship: How a Prosperous Family Can Prepare the Next Generation
- Authentic Trust in Modern Business
- A Retrospective and A Prospectus for the Future
- The Path of Altruism: A Reflection on the Nature of a Gift and Its Consequences in Leading to Entitlement or Enhancement
- The Three Forms of Governance
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