

The Purposeful Wealth Advisor: How to Build a Rewarding Career While Helping Clients Achieve Their Dreams

Raj Sharma

Amplify Publishing

Hardcover \$24.95 (252pp)

978-1-63755-548-4

The Purposeful Wealth Advisor is an excellent career guide with a focus on wealth management.

Renowned wealth advisor Raj Sharma's career guide *The Purposeful Wealth Advisor* models success in business as well as financial stability and motivation for one's future.

Guiding its audience toward success in US markets, this book stands to be of particular use to women, people of color, and immigrants. It shares step-by-step, career-specific guidance for becoming an advisor, succeeding in the position, and assisting clients in leading better, more rewarding lives. It draws on personal stories to demonstrate its recommended methods of achieving success, all of which abide by a few straightforward principles: attitudes of optimism, feelings of gratitude and modesty, respect for others and yourself, and openness and honesty. Its example of Sharma's own immigrant experience is realistic and also indicates respect for how immigrants affect the US's economy.

Sharma's analytical, methodical, and goal-oriented perspective on wealth management captures his particular dedication to contributing to society. He emphasizes his belief that financial advisors can achieve personal success by prioritizing the welfare of people and societies and makes a strong case for the dignified and rewarding nature of working as a financial counselor. The book further suggests that creating plans for earning and managing wealth is crucial to personal success and says that having a reliable financial advisor makes such success much easier to attain.

Each chapter begins with a quotation from a distinguished personality that creates an appealing sense of the content to follow. Key takeaways appear at the end of each chapter to summarize the preceding information. Sharma's language is direct and approachable, and his examples are easy to process. Footnotes are included to expand on the shared information, and the book's sources are credible and comprehensible.

Making wealth management seem both intriguing and attainable as a career (Sharma notes that there is no revenue limit; you are your own independent employer), the book makes a strong argument that unconventional advisors are necessary, too. Its thorough directions and counsel stand to have a positive, long-lasting influence on people's financial destinies. The text makes clear appeals to wide audiences—essentially, anyone who wants to succeed in their working lives and achieve financial success. While its focal career is narrow, its advice is applicable to other businesses and disciplines as well—not just those in financial services or the wealth management industry.

The Purposeful Wealth Advisor is an excellent career guide with a focus on wealth management.

MANIK CHATURMUTHA (November 2, 2022)

Disclosure: This article is not an endorsement, but a review. The publisher of this book provided free copies of the book and paid a small fee to have their book reviewed by a professional reviewer. Foreword Reviews and Clarion Reviews make no guarantee that the publisher will receive a positive review. Foreword Magazine, Inc. is disclosing this in accordance with the Federal Trade Commission's 16 CFR, Part 255.