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Zenvesting: The Art of Abundance & Managing Money

Paul H. Sutherland
Financial Sourcebook Publishing (January 1998)
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Perhaps it is the approach of the new millenium, but a shift away from accumulating for the sake of accumulating can be seen on every bookshelf. Thousands of words are devoted to simplifying your life and soothing your soul. With *Zenvesting: The Art of Abundance & Managing Money*, Sutherland, a Certified Financial Planner based in Michigan, advocates marrying your spiritual self with your financially hungry self. A noble quest, certainly.

The first three chapters of *Zenvesting* advise us to “wake up and smell the karma,” primarily by breathing deeply, recognizing commitments and priorities and making peace with “debt dharma.” To do so, 10 rules encourage taking responsibility for personal debt, establishing a safety net of six months expenses and paying cash. The author then rather abruptly shifts gears to discuss establishing an investment portfolio, preferably one that positively affects “global society.” His “Do-It-Yourself” strategy is comprised of five more rules: use mutual funds; pick a strategy and commit to it; review stock market yields; diversify your assets; and review your portfolio quarterly. Chapters are devoted to obtaining the proper insurance and planning for death and retirement. Sample budgeting worksheets and sample letters to use when interviewing prospective professionals are also provided. Quotes with a spiritual theme abound.

While marrying the spiritual self with the financial self may be a noble quest, marrying the two ideas in one book may not be. Neither topic is covered sufficiently here: novices to both spiritual teachings and investing will be lost, while those reasonably well versed in either topic will be left wanting.
VICKI GERVICKAS (September / October 1998)

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