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AN HONOR OF AN ASSIGNMENT

Trust is perhaps the key element that a strategist using the wealth management model—or any other type of financial professional—brings to the client relationship. We realize that you are entrusting us not just with your money, but also with your aspirations for the future. That's why we take the public face of our industry so seriously.

Trust is a key element in the financial management profession.

One of the key industry bodies in our profession is the Dow Jones Wealth Management Advisory Council. This board provides and disseminates crucial discussions of the "best practices" in our business so that practitioners like us remain knowledgeable not only about the tools available to us, but also about the way they are used, both strategically and ethically.

The Dow Jones Council is a tremendously valuable resource for everyone in our profession, as well as their clients, even if they're not directly aware of it. That's why it was so rewarding when both of us—David and Paul—were asked to join the Council. It's a recognition that our wealth strategist model is on the leading edge of personal finance.

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WHAT WE NEED TO DO

Over the next few months, our task will be to create a road map for the industry, pinpointing the ways that both individual managers and institutions can adopt wealth

Our task: To help create a road map for the industry.

management principles. We also plan to find ways to spread our gospel to people who haven't been the beneficiaries of wealth management practices, such as women and minorities. For more on the goals and background of the Council, please take a look at www.djwmac.com.

We are fortunate to be joined on the Council with some of the most important and far-thinking members of our industry. Other members include Merrill Lynch's senior vice president for investments, the senior vice president of UBS Private Wealth Management, and the director of Credit Suisse Private Banking. It's a pretty elite group: one that we're honored to be associated with.

The Council focuses specifically on advisers with high-net-worth clients who have complex financial needs—"advisers who will focus on the big picture, not just the Big Board," as Joseph Lanza, the Council's liaison to Dow Jones, puts it. Our industry is changing to a system where more and more advisers are taking a holistic approach to their clients' financial lives. As you know, that's the model we employ at The Ferrucci Company, and we are delighted with this opportunity to spread the word to our fellow financial advisers about what works.

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SPREADING THE NEWS

We firmly believe in the wealth management model we employ: the one that positions one expert to manage all aspects of a client's financial life, relying on other experts as needed. We think this is the best way for wealthy people to manage their affairs. Whether or not people are clients of The

Ferrucci Company, we feel it is important for people to have this option. That is one of the key things the Dow Jones Council does: it promotes the use of the best methods available for people to manage their resources.

That's why we're so excited to be a part of this—not because it's good for our business, but because it's good for people around the nation.

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The Dow Jones Council—and The Ferrucci Company— promote wealth management models that employ the best methods.

To learn more about why our wealth strategies are on the cutting edge of personal finance, please take a look at our Web site at www.ferruccicompany.com. Or you can give us a call directly at 800.633.3051, or send an e-mail to david@ferruccicompany.com or paul@ferruccicompany.com.

The Ferrucci Company
2 South Main Street
Essex, CT 06426
800.633.3051

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