



The Bank Customer's Guide To Safe & Smart Investing: Maximizing The Power of Your Savings Using: Mutual Funds, Annuities, Tax-Free Bonds, Government Bonds, Retirement Accounts, Certificates of Deposit, Stock Bonds, Successful Investment Strategies, Getting Started Tips and more

Jeffrey H. Champlin

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Designed as a tool for the bank investment sales representative to communicate with customers, The Bank Customer's Guide to Safe & Smart Investing is the perfect resource to help build and strengthen relationships with bank customers. This guide promotes the use of bank-based retail investment sales programs as well as builds the credibility of the trustworthy, knowledgeable, professional providers of investments and financial advice. It is designed for banks to educate customers on the basics of investing. This valuable guide offers bank customers: A step-by-step program to determine personal saving and investing needs; easy-to-understand descriptions of investment products, with emphasis on packaged products; help on how to use investments with the assistance, of their bank representative, and how and where to combine them with FDIC-insured bank accounts; basic investment strategies, such as asset allocation, and how to work with their investment representative to structure their investment and savings portfolio.

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