

BAMBULLETIN

April 2016

We recognize the value of the time and energy you spend building your client relationships. With that in mind, we are sharing highlights, key updates and success stories from the BAM ALLIANCE community, so you can learn about how we are helping firms like yours leverage their time and resources to build successful, independent wealth management firms. We hope you'll find these items informative and educational.

Brian Shapiro

Client Development Manager, BAM Advisor Services
bshapiro@bamadvisor.com, 314.743.5102

MAURER ON THE MOVE

The start of 2016 has been a busy one for **Tim Maurer**, director of personal finance for the BAM ALLIANCE.

- Tim's new book, *Simple Money: A No-Nonsense Guide to Personal Finance*, was **released in March**. Tim offers a behind-the-scenes look at *Simple Money* in this quick-hitting **Q-and-A**.
- Tim was a featured presenter in a recent **LinkedIn on-demand webcast**, which looks at how advisors are using social media and thought leadership platforms to engage and educate prospects and clients. Research by LinkedIn and the Financial Planning Association shows that 67 percent of high-growth firms have added clients as a result of social media activity. This webcast offers views on how you can put a plan together to help you achieve success using social media. (**Note:** Tim's session, "Backing Into Social Media and Thought Leadership," begins around the 38-minute mark.)
- Tim has continued to provide his usual insight and thought leadership for the BAM ALLIANCE and various high-profile platforms, such as **weighing in with CNBC** with his tips for a long-term investment strategy, and **sharing with Forbes** how investors who are willing and able to effectively capture market returns can beat the pros.



BAM ALLIANCE MEMBERS SHARE THEIR TAKES

The BAM ALLIANCE website and social media platforms are the proud homes of articles and insights from our National Thought Leaders such as Tim Maurer, Carl Richards, Dan Solin, Larry Swedroe and Manisha Thakor.

Those aren't our only subject-matter resources, however. Far from it, in fact. We also lean on and share the first-hand perspectives from the advisors who make up our very own community. The following are some of their recent viewpoints:

- **[Smart Philanthropy: Navigating Personal Values](#)**
 - **[The Life-Changing Power of Professional Advice](#)**
 - **[Seven Essential Questions to Ask Your Aging Parents](#)**
 - **[Financial Tips for Couples](#)**
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MARKET TALK



A foundation of evidence-based investing is the call to not hastily react to the day-in, day-out fluctuations of the market (of which there were plenty in the first quarter). But that doesn't mean we don't follow what's happening in the market and, more important, analyze what the latest developments may mean to prudent investors over the long haul.

Our subject-matter resources share some of their academic-based market talk:

- [Video: CAPE 10: Signaling the Market Is Vastly Overvalued](#)
- [Emerging Markets Look Terrible -- Time to Buy](#)
- [Volatility Drives Retirees to Think Longevity Annuity](#)

A MESSAGE FOR ALL AGES

You are never too young to learn about money, nor are you ever too old to learn even more than you already knew. The BAM ALLIANCE offers myriad money tips and financial planning suggestions to people across the age spectrum:

- [Tips for Teaching Your Children About Money](#)
- [Why Millennials Spend More Than They Should](#)
- [Stressed Out Gen X](#)
- [Money Steps to Take Before Your 40th Birthday](#)
- [Retiring? Consider These Three Things to Avoid Running Out of Money](#)

JOIN THE MOVEMENT ... JOIN THE BAM ALLIANCE



Take your firm further. Do more than you thought possible.

When you work with us, it's about providing you with more resources, growth and time.

[Click here](#) to see how it works when you join the movement and join the BAM ALLIANCE.

To learn more about our prudent and proven approach, or to have a conversation about becoming a member of the BAM ALLIANCE, please contact **Brian Shapiro**:

bshapiro@bamadvisor.com

314.743.5102

[BAM Advisor Services](#)

