

# Wealth management essay example

[Business](#), [Company](#)



Jerrod, my financial advisor, is a hero in this field of wealth management. Wealth management is the art of financial planning and managing to meet the organizational requirements to facilitate it in achieving its goals. I learned many skills that have enabled me to manage marketing and administration department and all other financially related skills during my internship. Financial sectors are a major department in all organizations since it is the key in business thriving (Evensky, 123). This is because it aids in developments of diverse economical; it facilitates trade and exchange and enables national developers.

For my research paper, I have decided to deal with several questions that will help understand more of what my financial management field entails. These questions are as follows

**Q1 The history behind trading in the financial institutions and the developments associated with it.**

Q2. How has information and technology have enabled a growth in wealth management?

Q3. Finally, how the field has adjusted to meet the changing needs of the society.

This will help understand why a growth becomes eminent enabling nations to operate their own financial market (Maude, 200). This is because during the internship session, I realized that technology has enabled companies have communicated with, their clients on issues concerning wealth management without any difficulties. The company shows ways in which it has been able to automate its systems that intern has been fueling globalization. I have carried out research from several articles.

## **Vichet Sum Article**

One of the articles is about Vichet sum, and it explains about the training programs that enable companies to enjoy market benefits and performances. This was to help understand other measures to be undertaken to ensure continuity in management of the wealth management (Evensky, 141).

The other article dealt with the value of wealth and fund management in companies, and how they are carried out. Wealth management is said to be done by examining the stock and the traded goods.

Interviewing my coworkers was the other helpful way of doing my research. I referred some questions to the supervisor as shown in the below context.

Q1. What are the few events in your life that helped you become the person you are to date? His response was that he faced many challenges and difficulties. This resulted in positively taken acts, which became lessons of molding him into a better person in the future.

Q2. What was learned in college that was applied in real life? (Maude, 231).

The response was that everything taught in school is experienced in the field directly and indirectly.

Q3. How did he acquire his current position? The response was simple through hard work.

Q4. What has shaped his fields over time? (Evensky, 165). The response was that through combined efforts and idea from his fellow loyal colleges.

Q5. How would you describe the history of your organization's relationship to the Los Angeles community? His response was that they started as a small business, but through changes of people's demand and expansion of an idea

they have developed for the organization they are today, just like the Los Angeles organization.

Q6. Did you feel your position as a form of civic engagement? His response was ' No,'and said that he felt his position to be more of his purpose in life. He loved his job very much and was always determined to make it grow further.

Q7. Where he will be in the next ten years and why? His response was that this company would be the worldwide icon. This is because they have the skill and finances and technology has narrowed its manual job.

## **References**

Evensky, Harold. Wealth Management: The Financial Advisor's Guide to Investing and

Managing Client's Assets. Chicago: Irwin Professional Pub, 1997. Print.

Maude, David. Global Private Banking and Wealth Management: The New Realities. Hoboken:

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