

SELECTED PUBLICATIONS

Books

- *Recognizing the Opportunity: Wealth Management, Estate Planning & Life Insurance*, Charter Financial Publishing Network (2008 release date TBD)
- *Beyond Performance: How Hedge Funds Can Strengthen & Build Their Affluent Client Base*, Universal Media, 2008
- *Fame & Fortune: Maximizing Celebrity Wealth*, Universal Media, 2008
- *The Sky's The Limit: Marketing Luxury to the New Jet Set*, Charter Financial Publishing Network, 2007
- *Wealth Management: The New Business Model for Financial Advisors*, Wealth Management Press, Penton Media, 1st edition 2003, 2nd edition 2005
- *Inside the Family Office: Managing the Fortunes of the Exceptionally Wealthy*, Wealth Management Press, Penton Media, 2004
- *Women of Wealth: Understanding today's Wealthy Female Investors*, The National Underwriter Company, 2004
- *eWealth: Understanding the Internet Millionaire*, Institutional Investor, Inc., 2000
- *Advisor2000: Strategies for Success in the New Millennium*, The Prudential Assurance Company of America, 1999

Papers

- *The Year Ahead in Private Equity* (with Rothstein Kass), 2008
- *Millionaire Intelligence Among Investment Advisors*, 2008
- *Onward & Upward* (with Rothstein Kass), 2008
- *The Compensation Conundrum* (with Rothstein Kass), 2007
- *Capturing the Opportunity in Hedge Funds* (with Rothstein Kass), 2007
- *Sourcing Private Wealth: A Segmentation Analysis of Hedge Fund Investors*, 2006
- *The New Jet Set: A Psychographic Analysis of Luxury Spending*, 2006
- *2006 Family Office Compensation Report* (with Institutional Investor), 2006
- *The Estate Tax & The Affluent: A Look at the Impact of the Federal Estate Tax on Those Most Likely to Pay It*, 2005
- *2005 Family Office Compensation Report* (with Institutional Investor), 2005

Columns & Magazines

- Executive Editor, *Private Wealth*, May 2007-present
- **Calculated Response** column, *Worth*, March 2007-present
- **Professional Insights** column, *Financial Advisor*, January 2000-present
- **Finance** column, *Elite Traveler*, January 2004-present
- **The Wealth Advisor** column, *Registered Rep*, January 2002-December 2005