



## Case Study Library

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All In the Family  
Alternative Investments – Direct or fund of funds?  
Am I My Sister's Keeper?  
Asset Allocation – From a family's perspective  
Asset Allocation – From an advisor's perspective  
Bets: Right or Wrong? Clients Decide!?!  
Build the Ideal Wealth Management Firm  
Client Servicing – What if you hate the relationship with your relationship manager?  
Do I Stay or Do I Go?  
Dollar Cost Averaging: When do you jump in the pool?  
Entitlement Blues  
Family Dynamics – Should we even bother?  
Family Feud: Who dares speak up?  
Fee Fi Fo Fum: Should fees be bundled, flat or hourly?  
Follow Me!  
Follow the Money: Can you find the finder's fee?  
Fooled Again: Manager Selection  
Hiring & Firing – Should this manager be fired?  
Hiring & Firing – Should this manager be hired?  
Investments for Good: Philanthropy and foundations  
Land of Opportunity: Should This Manager Be Hired?  
Letting Go & Taking Back: A Case Study on Family Leadership  
Love and Marriage: Navigating the world of prenups, family relationships and wealth issues surrounding marriage  
Market Timing: When do you jump in the pool and whose economic interests are best served?  
My Company Is a Winner  
No Conflicts!  
Open (and Shut) Architecture: Which builds the better house?  
Performance: Track record or trick record?  
Raiders of the Lost Legacy  
Risk Tolerance: Would you mind or will you go out of your mind?  
Roller Coaster Markets  
Rose Colored or Ruse Colored Glasses?  
Skin in the Game: Multi family office or multi family nightmare?  
Skin in the Game: Does it mean they are committed or conflicted?  
The Trusted Advisor – Can I still trust him after he starts a fund of funds?  
The USA Is the Best  
The Vertigo of Falling Income  
Track Record or Trick Record?  
Trust Versus Bricks & Mortar: When do you follow your advisor to a new firm?  
What If I Don't Want What I Need?  
What's It Really Going to Cost Me?  
Will They Blow It Again?  
Would You Mind or Will It Drive You Out of Your Mind?