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This chapter is excerpted from The Enduring Advisory Firm: How to Serve Your Clients More Effectively and Operate More Efficiently (Bloomberg Press/Wiley, 2016) by Pershing Advisor Solutions CEO Mark Tibergien and BNY Mellon Global Head of Segment Technology Marketing, Kim Dellarocca.

The Key Business Trends in the Advisory Business

Mark Tibergien: Regulators/industry "allow― for investor confusion on ... Enduring Advisory Firm (with Kim Dellarocca), Investment ... advisory firms, then they are being credentialed and developed and trained in a way that other professions are like the legal profession or the

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