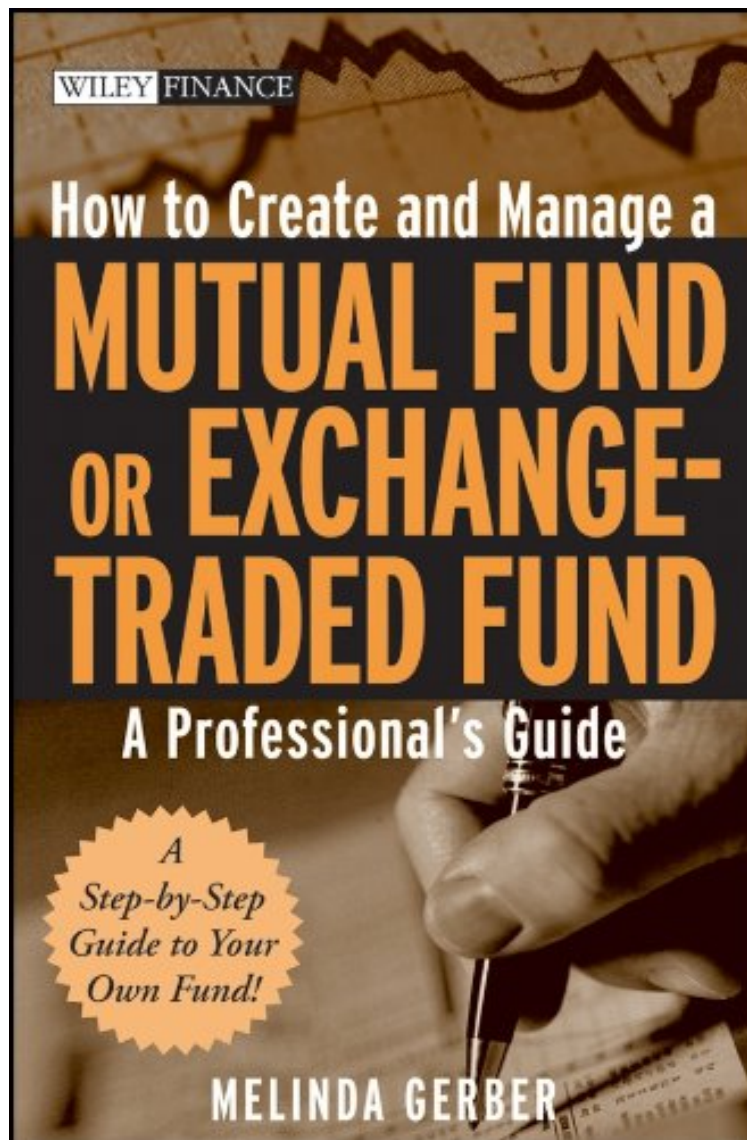


[E-BOOK] How to Create and Manage a Mutual Fund or Exchange-Traded Fund: A Professional's Guide (Wiley Finance)

How to Create and Manage a Mutual Fund or Exchange-Traded Fund: A Professional's Guide (Wiley Finance)

Melinda Gerber

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Melinda Gerber : How to Create and Manage a Mutual Fund or Exchange-Traded Fund: A Professional's Guide (Wiley Finance) before purchasing it in order to gage whether or not it would be worth my time, and all praised How to Create and Manage a Mutual Fund or Exchange-Traded Fund: A Professional's Guide (Wiley Finance):

7 of 7 people found the following review helpful. Amateurish backward looking approach to businessBy Franz K.This book repeats itself in many places, and the author makes numerous comments that would indicate she is an industry pretender rather than truly experienced. There are comments about, "this new interesting medium called the internet". The book was published in 2006? How can a forward looking person be so clueless? There are numerous comments about embedding and "hiding" fees in various charges. This is not a sign of a person who "gets" what is happening to this industry. The details about distribution, and regulatory filings are decent. This book could be a long article. There is very little information that is useful to an actual practitioner. 12 of 12 people found the following review helpful. Unmet ExpectationsBy Ryan A. WimmerI was hoping for a clear, concise guide from an expert in the subject that is a good writer, but this was not the case. The book contains some good information, but the writing is not good and the information is not well organized (lots of wandering). The author also tries to be "cute" in some areas (Top 10 things you don't want to hear from . . .) and it just slows you down without any benefit. I would hope there is something better out there . . . 1 of 10 people found the following review helpful. Exactly what I neededBy DianaLooking to start a mutual fund... gave me a lot of great insight into what the necessary steps are.

With this book, author Melinda Gerber walks you through the twenty-nine steps needed to start a mutual fund and the thirty-six steps needed to start an ETF. She provides costs and detailed explanations of how to accomplish each task from fledgling idea to the actuality of selling shares, and also takes the time to explain the importance of creating a clear vision for your fund as well as how to successfully profile customers and identify your competition.

From the Inside FlapSince the birth of mutual funds more than eighty years ago, the industry has seen constant changes: new products, different regulations, scandals, and a variety of emerging players. Yet each evolution that the fund world has experienced has created opportunities and bred innovation. Whether you want to be an industry star, take your current business to the next level, look to prove a theory, change your career, or make a social statement on a broader level, this is a great business. For professional money managers and serious investors looking to start their very own mutual funds or ETFs, *How to Create and Manage a Mutual Fund or Exchange-Traded Fund* provides a smart and comprehensive step-by-step guide. With this book, author Melinda Gerber walks you through the twenty-nine steps needed to start a mutual fund and the thirty-six steps needed to start an ETF. She provides costs and detailed explanations of how to accomplish each task from fledgling idea to the actuality of selling shares. The inclusion of timelines and common mistakes to avoid will assist you along the way. One common mistake, picking the wrong team, can crush a fund. Here she underlines the value of assembling a team of partners—;not independent contractors. Gerber takes the time to explain the importance of creating a clear vision for your fund and reveals how to develop a message, profile customers, and identify your competition. She also outlines a diverse marketing plan with promotion and publicity ideas to fit any size budget. This book's information-packed appendixes provide valuable insights on what to expect in your first year, how to go about selling your business, and useful Web sites, phone numbers, and readings. *How to Create and Manage a Mutual Fund or Exchange-Traded Fund* will take you on a carefully planned, step-by-step journey that will teach you all you need to know to succeed in this very rewarding business. From the Back CoverPraise for *How to Create and Manage a Mutual Fund or Exchange-Traded Fund* "This book should be viewed as a complete business plan and guideline for the successful launch of a new mutual fund. Melinda Gerber has covered everything. She magnificently weaves together a complex, even overwhelming, regulatory environment with entrepreneurial spirit. How I wish this book had been there for me seventeen years ago, when I was launching my fund, but to be honest, it will be a vital resource to me and to my industry today." —;Amy Domini, founder and CEO, Domini Social Investments "If you are thinking of starting a mutual fund or ETF, start here! Melinda Gerber maps the route to create a successful fund. Relying on her extensive contacts with leaders in the fund world and her intimate knowledge of the legal and financial requirements of running mutual funds and ETFs, she has compiled a treasure trove full of hard-to-find marketing information, explanations of laws, and detailed analyses of the economics of running a fund. This guidebook is so readable that a novice will find it enjoyable, and so thorough that even professionals in the mutual fund industry will find useful insights to improve their practices." —;Peter Mangan, President and CEO, Shareholders Service Group "Melinda Gerber has written a thorough, engaging, easy-to-grasp book on the whats and the hows of building your own mutual fund or exchange-traded fund. Gerber takes what could potentially be a complicated, difficult subject and, through a clear, step-by-step process, makes you feel like you could build an ETF from the comfort of your own home." —;Tom Lydon, Editor, ETFtrends.com "This book provides a step-by-step guide for capitalizing on the growing mutual fund and ETF markets, effectively removing the guesswork and empowering firms to participate. This book not only instructs firms in starting and managing mutual and exchange-traded funds, it also details what to expect in the first year and lists useful Web sites, phone numbers, and readings to help along the way. This is a must-read for any new entrant in these highly profitable markets." —;Chip Roame, Managing Principal, Tiburon Strategic Advisors "Melinda Gerber's first book on creating a mutual fund was unparalleled. This book is even better. This version is a true how-to guide. It is also a training guide, not just for people who want to start a mutual fund, but also for those who want to understand

their inner workings." mdash;Louis P. Stanasolovich, CFP, CEO, President, Legend Financial Advisors, Inc. About the Author Melinda Gerber, MBA, has served as the secretary on the board of directors for the Ameristock Corporation and Ameristock Mutual Fund, and concurrently worked as a project manager and consultant at GAP, Inc. During her tenure at GAP, Inc., she was recognized as one of the five most innovative individuals in the company. Gerber earned an MBA from the University of Southern California and a BS from the University of California, Santa Barbara.