

## **WEALTH MANAGEMENT AND FINANCIAL PLANNING**



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Suleman Din is technology editor of American Banker and Financial Planning. Follow him on Twitter at @sulemandn.

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G. Victor Hallman is a Lecturer in Financial and Estate Planning in the Insurance and Risk Management Department of the Wharton School, University of Pennsylvania, as well as a member of the Pennsylvania Bar..

Jerry S. Rosenbloom is the Frederick H. Ecker Emeritus Professor of Insurance and Risk Management and Academic Director of the Certified Employee Benefit Specialist (CEBS) Program at the

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