'Holistic Guide to Wealth Management' Empowers Tax & Accounting Professionals to Upgrade to Financial Planning Services

New handbook maps the science behind integrating services with the human side of behavioral financial advice.

CPA Trendlines - Actionable Intelligence for the Tax, Accounting & Finance Community

NEW YORK CITY, NY, UNITED STATES, February 1, 2025 /EINPresswire.com/ -- Americans with financial planning questions will be getting a boost from tax and accounting professionals armed with the "Holistic Guide to Wealth Management," the new professional practice guide published by CPA Trendlines Research,

> The traditional service model often views clients as people with problems that need solving. In reality, they are individuals with values, goals, and emotions deeply tied to their business and money,"
>
> *Rory Henry, CFP®, BFA™*

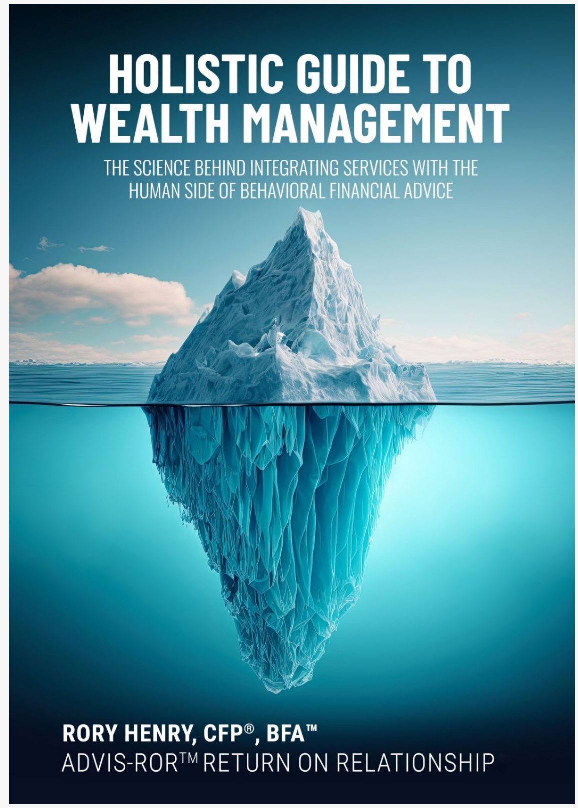
"Holistic Guide to Wealth Management: The Science Behind Integrating Services with The Human Side of Behavioral Financial Advice" rolls out a roadmap for accounting professionals, particularly CPAs and tax practitioners, to expand client offerings beyond traditional tax preparation and accounting services and into financial planning, wealth management, investment advisory, and family office.

"It all comes down to relationships and the human side of advice," says Rory Henry, CFP®, BFA™, the chief author among more than 30 nationally recognized experts contributing chapters to "Holistic Guide to Wealth Management," available for pre-order here: https://cpatrendlines.com/shop/rh24hol-rory-henry-holistic-guide-to-wealth-management.

Henry tells advisors, "You need to start thinking of yourself not as a practitioner but as a conductor who directs all of the specialized advisors who serve your client's business and personal financial needs."

Thanks to advances in technology and the "virtual family office model," Henry says it's never been easier for CPAs to provide "truly holistic advice" to clients that integrates accounting, tax, estate, insurance, legal, philanthropic, investment, and administrative matters – all while remaining the client's most trusted advisor and central point of contact.

"This handbook isn't just about managing wealth," says Rob Santos, CEO of Arrowroot Family Office and a contributor author. "It's about managing relationships and aligning outcomes with what truly matters to clients—a principle we hold dearly at our firm."



Pre-Order Holistic Guide to Wealth Management: The Science Behind Integrating Services with the Human Side of Behavioral Financial Advice at https://cpatrendlines.com/shop/rh24hol-rory-henry-holistic-guide-to-wealth-management/

The handbook explains Henry's development of a new professional for delivering wealth management services, the Advis-ROR® (for Return on Relationship). The system, he says, helps advisors "move beyond the numbers" to build human connections with their clients.

"The traditional service model often views clients as people with problems that need solving. In reality, they are individuals with values, goals, and emotions deeply tied to their business and money," Henry says.

Henry says an Advis-ROR® is trained to deliver more than just financial results. "Advis-ROR® helps clients align their business and financial decisions with a life of meaning and purpose. It's about asking the right questions and guiding clients to envision a future they can see, feel, and achieve."

Henry has spent his career at the intersection of accounting, wealth management, and technology. He and his two dozen-plus expert contributors espouse a holistic and integrated approach to financial advice, with the advisor as the "flywheel" at the center of the client relationship.

"When CPAs embrace the flywheel model, they don't just serve clients—they create a perpetual motion of value, trust, and innovation," says Henry. "The most impactful advisors aren't those who speak the most, but those who listen deeply and ask the questions that matter. That's how they maximize their ROR."

About the Author: Rory Henry, CFP®, BFA™
A Certified Financial Planner™ and a Behavioral Financial Advisor (BFA™), Rory Henry is a director at Arrowroot Family Office and co-founder of AFO Wealth Management Forward. The originator of the Advis-ROR® methodology (Return on Relationship), he hosts the AFO Wealth Management

Forward podcast show and has been published in numerous financial and accounting media outlets.

Rory Henry, CFP®, BFA™, is the Director at Arrowroot Family Office and Co-Founder of AFO Wealth Management Forward.

"Holistic Guide to Wealth Management" Nationally Recognized Expert Contributors:
Cody Barbo - Trust & Will
Dan Bolton- Nitrogen
Rob Brown - Accounting Influencers
Susan Bryant - Unboxed Advisors
Randy Crabtree - Tri-Merit
Michael DiJoseph - Vanguard
John Fenton - John J Fenton
Seth Fineberg - Accountants Forward
Loren Fogelman - Business Success Solutions
Randy Fox - Two Hawks Family Office
Philipp Hecker - Bento Engine
Julie Johnson- XY Communication
Randy Johnston - K2 Enterprise
Aaron Klein -Nitrogen
David Knoch and Ryan George - Docupace
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Rob Santos - Arrowroot Family Office
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Phillip Whitman - Whitman Transition Advisors

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CPA Trendlines Research is a specialized research and advisory platform dedicated exclusively to the tax, accounting, and finance professions. It offers actionable intelligence through a proprietary blend of data, analysis, community insights, and expert commentary. The platform features over 10,000 articles, numerous handbooks, manuals, and many data points, including checklists, step-by-step procedures, examples, case studies, and real-world experiences. Recognized as "a key source of insights, data and actionable intelligence for hundreds of thousands of accountants worldwide," CPA Trendlines Research is a major platform for thought leaders to share bold insights and innovative ideas. The platform offers a PRO Membership, granting exclusive access to premium content, early notifications, special offers, bonus features, and VIP services. Members benefit from comprehensive resources to enhance their practices and advance their careers.

About Arrowroot Family Office
https://arrowrootfamilyoffice.com
Arrowroot Family Office is a registered investment advisor and financial and tax planning firm. Arrowroot Family Office was designed to provide the family office approach to holistic wealth management, regardless of the client's net worth. With a deep belief in the transformative power of technology and collaboration, the principals and staff of Arrowroot Family Office provide a high level of service, transparency, and value to its clients. For more information, please visit www.arrowrootfamilyoffice.com.

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