

Wall Street's Just Not That into You: An Insiders Guide to Protecting and Growing Wealth

Roger C. Davis

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For the affluent, this guide to sustaining wealth offers solid advice.

Part financial advice, part self-help guide, Roger C. Davis's *Wall Street's Just Not That into You* is an easy read with a clear point of view and concrete suggestions for having a better relationship with your investments.

Written by a financial services insider who has more than two decades of experience (including as a former senior vice president with UBS Financial Services), this book helps the affluent—those whose smartphone contact lists include a CPA, a trust and estate lawyer, a life insurance specialist, and a property and casualty specialist, and who might consider buying their daughter a Mercedes Benz for her sixteenth birthday—grow and protect their wealth.

Davis's premise, that Wall Street "has no intrinsic interest in looking out for you," (and why should it, when Wall Street's true objective is simply to maintain and grow market share), does offer enough reason for investors to become more familiar with the success and failures of their investments. He presents the case that a "one-size-fits-all" mentality really doesn't fit all, and that ultimately the investor's risk is his alone—Wall Street isn't the one who wants to send a child all the way through a PhD program or dreams of retiring to travel the world. Bottom line, Davis believes that it's a mistake to stick with the common "buy-and-hold" theory promoted by most advisors with large corporate firms simply because that's what's always been done, and he offers data to back up his theory.

Through metaphors ranging from roller coasters to food poisoning, and personal stories from his wife surviving breast cancer to moving their family from Mississippi to Los Angeles to support his daughter's musical aspirations, Davis drives home multiple arguments for taking financial responsibility—across the board, but particularly when it come to investing. At times, these elements come across as heavy-handed, especially when they hit one right after another, but they do get his point across.

The blurb from New York Times bestselling author Keith Ferrazzi on the back is a boon, but spelling, grammar, and punctuation errors throughout the book detract from the professionalism of the content. It should be noted that this review is based on an advance reader copy. Although Davis might consider flipping the inside cover copy from front to back to emphasize the book synopsis over his bio, the clean black, white, and red packaging is sharp and appealing to the eye. The title is a nice play on the title of a popular *Sex and the City* episode, subsequent tough-love book, and film, and should capture attention.

KIRSTEN AKENS (June 12, 2015)

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