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Samuel J. Gottlieb, CFP, CFA. Now an instructor of courses for the CFA, Financial Risk Manager, and securities licensing exams, Sam was formerly a New York trust/estate/tax attorney and then a successful Merrill Lynch wealth management advisor. He passed all three levels of the CFA exam on his first try by distilling only the essentials from the multi-volume CFA curriculum materials into the numbered outline form shown in this book. He found that other books cover the same material, offering less material than the CFA Institute, but still more than you really need. He makes it fast and easy for you to focus on what you need to pass the Level II exam in this streamlined course of study.

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