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L'objectif de cet Aide-mémoire est de donner une vue synthétique des fondamentaux de la gestion de patrimoine. Il couvre les dimensions juridiques, fiscales, financières, immobilières, ainsi que l'approche commerciale pour le conseiller clientèle.

De nombreux tableaux et figures permettent de mémoriser les schémas de raisonnement et de repérer les informations essentielles.

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Author : Catherine Karyotis, Jean-Marc Béguin, Stéphane Dubreuille, Stéphane Fourneaux & Jean-Christian Mazzoni
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