
Green Zone Strategies

By Jim Otar *Wed, Oct 21, 2009*

In Chapter 42 of "Unveiling the Retirement Myth," Otar explains how to advise the "Green Zone" clients whose assets can easily finance their retirements.

"One of the perpetual fads in the advisory business is to pursue high net worth clients," Otar writes. "Keep in mind that what matters most is not the size of assets, but how fast those assets are drained. Being in the green zone is a good indication that the client will likely be a good source of revenue for you, as long as you can create the 'normal' index returns and as long as you can maintain his/her trust."

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