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Investing in times of turmoil

Financial market volatility is very much on investors' minds these days. The uncertainties are unusually ambiguous, and events are unfolding rapidly. How will the war in Ukraine be resolved? Will the Fed increase interest rates as promised, or will there be another pause? When will supply chain issues be fixed? How will the much higher energy prices ripple through the economy? How bad will inflation get this year?

Unfortunately, we do not have the answers to any of those questions. No one does. Anyone who claims to know such information is usually selling something.

What we do have is investment management experience through many market cycles. We help investors meet their long-term financial goals.

Profile

- Couple in their early 70s, retired for five years.
- Estimated investable assets today of \$500,000, plus an IRA rollover that hasn't been tapped yet.
- They thought that their nest egg would be enough for a secure retirement, but now they aren't so sure.
- They are uncertain what steps to take in this market environment.

How we can help

- We can develop an asset allocation plan for their portfolio, balancing their risk tolerance with their investment objectives.
- We can provide professional portfolio management.

Your transition question to make the referral

“What is your larger concern, short-term market fluctuations or longer-term loss of purchasing power?”

Whatever they answer, our services for investors can help restore their peace of mind.

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Not Bank Deposits or Obligations	May Lose Value