



Mentor RIA Consulting

Allowing you to focus on what you do best

What financial issues do YOU worry about?

One reason people seek financial advice is to become more comfortable with a variety of issues related to their finances. “I want to be able to sleep at night” is how one client described her focus on getting a solid wealth plan in place. Another approach has been to ask “what things should I be worrying about and what things do I not need to be concerned with in my life?” Many advisers, as a starting point for the conversation, counsel their clients not to worry about the things that are out of their control and to take steps to address those items that are within their control. This may sound simplistic, but it is true and it is not always easy to do.

For example, we all know that we cannot control or even predict what the markets will do tomorrow, next week, next year. Reduce your worry about the markets by avoiding unnecessary risk, lowering your costs, investing with purpose. Your adviser can help you with this, particularly in connection with investment recommendations based on research and the markets.

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