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WEALTH MANAGEMENT • INVESTMENTS



## Investment Planning in Uncertain Times

Over the last decade or so, we have seen tremendous volatility in the financial markets, wars, and devastating natural disasters. While these events are largely unrelated, they have all served to educate investors about the true meaning of risk and the value of a properly diversified portfolio.

After a long bull market in the 90's, investors have had to face widespread accounting scandals and bankruptcies by major corporations, the 9/11 terrorist attacks, and most recently, the "Great Recession." With so much turmoil, one can honestly wonder how it's possible to invest successfully in such uncertain times.

While I believe that investors will continue to face increased market volatility, the key to successful investing now is the same as it was over 25 years ago when I began in the investment business. Keep it simple and have a strategy in place. By developing and adhering to a financial plan, you will be able to look past short-term volatility and stay focused on your own unique investment objectives. Reassessing and updating your plan periodically is equally as important, though. This will not only ensure that it is performing in line with expectations, but that it reflects any changes in your risk tolerance or time horizon.

Although there is no perfect time to invest since we can't predict the markets, with all that has transpired recently, now would be the perfect time to conduct a portfolio review with an investment advisor like myself. Unfortunately, it sometimes takes a dramatic event like those mentioned above, or a large correction in the markets, for many investors to think beyond the assets in their portfolio and start focusing on the asset allocation of their portfolio. I have spent my entire adult life helping investors grow and manage their assets. If you are not already working with an investment professional, or simply want another perspective, I'd welcome the opportunity to share my experience with you as well.

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