

# What You Think We Do vs. What We Actually Do

## What You Think We Do

- Beat or outsmart the market
- Avoid or side-step volatility
- Pitch or sell you on investments
- Have a third party make our investment selections
- Have a crystal ball to see the future of the market

## What We Actually Do

- Share the realities of being a market investor
- Minimize a client's harmful, emotional decisions
- Earn competitive returns while taking less risk
- Take advantage of volatility to buy stocks "on sale"
- Provide comprehensive financial planning
- Explore options and provide a range of solutions

## What We Cannot Control

- Media headlines
- Politicians creating market disruption
- Global events
- Terrorist events
- Latest fads from Wall Street
- Domestic economic events

## What We Can Control

- Act quickly when volatility puts stocks "on sale"
- Stay connected via email, phone and meetings
- Conduct due diligence on potential investments
- Diversify your investments
- Keep current on research and reading
- Act in your best interest as a fiduciary