

Many investors often fail to understand that financial planning isn't a one-time task, it is a lifelong process. Depending on life events and other factors, there may be times when you will have to update and make changes to your financial plan and portfolio. There may come a time when you'll need to make tough financial decisions, and during these times it can be invaluable to have an experienced, caring advisor in your corner. When people try investing on their own, they often fail to properly and regularly rebalance because the idea of selling something that has gone up, and buying more of something that is temporarily down, seems counter-intuitive. But maintaining the appropriate risk-adjusted return profile of your portfolio is most important, and vital to your future financial security.