

For years now, we here at ISI have highly recommended that for the purpose of planning withdrawals of retirement funds, generally speaking, it should be limited to approximately 3% annually of one's portfolio. Additionally, I have never been a proponent of automatically adjusting one's portfolio based upon age. Instead, I have always urged clients to have one's specific goals and financial plan be the driver of how investments should be allocated. This brief, 3-minute video discusses both of these very important issues, and I'm confident you'll find it of interest.