

5 BENEFITS

OF WORKING WITH AN ADVISOR

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PROFESSIONAL MANAGEMENT

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CLARITY

Some people are very open about money matters, but most are not. Working with an advisor may be one of the few places a conversation about finances can be direct and candid. Such discussions bring clarity to the vision of where you see yourself at some future point. What do you want to have achieved by the time the children leave the house, graduate college, or you decide to retire? Goals don't always clarify in one try, and an advisor can frame these discussions, keeping you focused and on track.

ACCOUNTABILITY

We all find the motivation to pursue and achieve goals in different ways. Some of us hire personal trainers to help reach physical goals, coaches to help make better business decisions, or therapists to help make better emotional decisions. This is more than asking a friend to keep you honest. Being held

accountable by knowledgeable counsel brings the expectation of knowing someone experienced with your goals will be asking how you followed through on your commitments. Someone to ask what worked and what didn't, what can you do better next time. Someone who can help you stay focused on the goals you determined are important to you.

EDUCATION

When you hire someone for a job, you like to understand how they do it. You feel it is your responsibility to understand, at a high level, how the job is done and the expected outcome. Plus, it is fun to learn something new. When clients hire us, they should hold similar expectations. They should be curious, ask questions, and understand how we take action on their behalf. And feel encouraged to keep asking until the answers are satisfying.

SIMPLIFICATION

Life can get complex, and our financial lives often follow suit. Working with an advisor can simplify your financial lives by placing the burden of managing complexity on a trusted third party. An advisor, or professional manager, will work to simplify your financial life where possible, bringing efficiencies, increasing understanding, and enhancing your ability to make decisions.