

THE VALUE OF PLANNING

- Advisors help their clients keep track of—and make more efficient—their financial affairs.
- Advisors help their clients create an organized, diversified portfolio, and stand between them and the dysfunctional emotional decisions that everybody makes with their own investments.
- Advisors help their clients get into the habit of saving (and investing) a portion of their income.
- Advisors help people identify what is important in their lives, and prioritize their goals.
- Advisors help people turn seemingly impossible goals into a routine that can achieve them.
- Advisors help people bring the focus of their lives from retirement to the present.

Based on Bob Vere's Inside Information