Building the Road to a Solid Financial Future

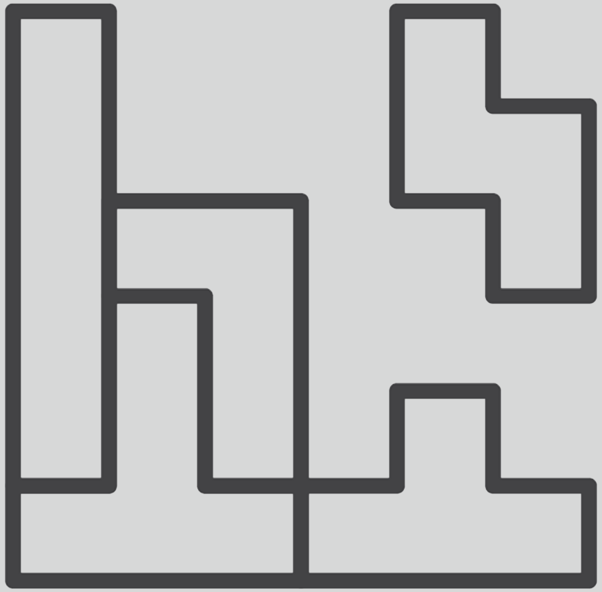
Achieving financial goals

You'll learn valuable practices of my clients, and the financial marketplace

Work toward your goals and avoid common investing mistakes

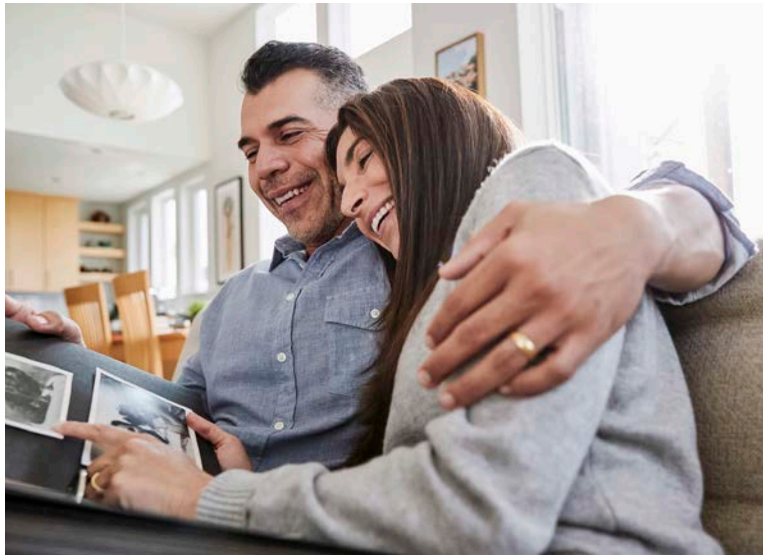
Learn how to use these steps on the road to a solid financial future as guidelines for your success

Step 1

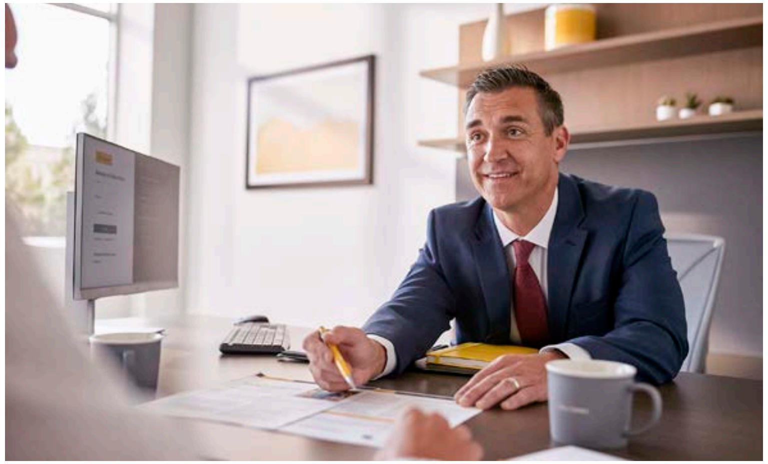


Develop your strategy

- What's most important to you?
- Document your goals



Benefits of working with a financial advisor



Outline and prioritize your long-term goals

Maintain discipline and provide guidance

Revisit your goals to help keep you on track

Step 2

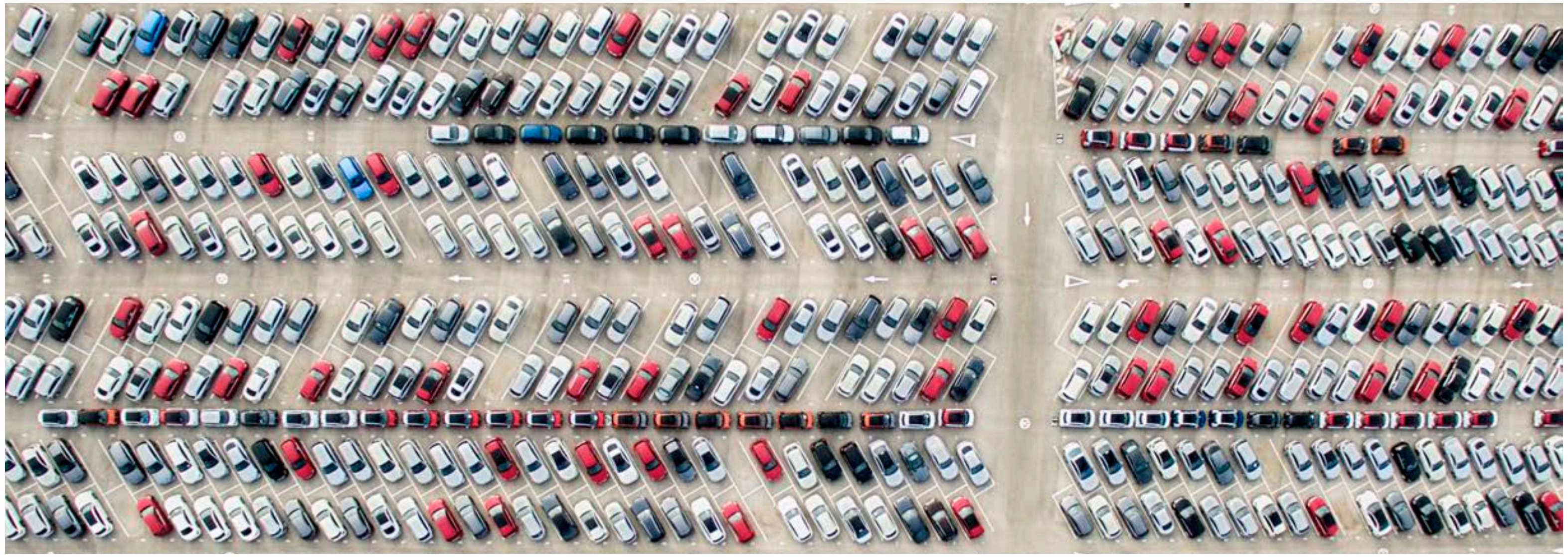
Understand risk

- Risk is more than the ups and downs of the market
- How much risk makes sense?
- Address the most important risk

Step 3

Diversify for a solid foundation

- The benefits of diversification
- It’s the mix that matters
- Deeper diversification with asset classes



Step 4

Stick with quality

- What is quality?
- Fads vs. fundamentals
- Don’t reach for yield

Step 5

Invest for the long-term

- Time in the market, not timing the market
- Buy and hold doesn't mean buy and forget

Important tip

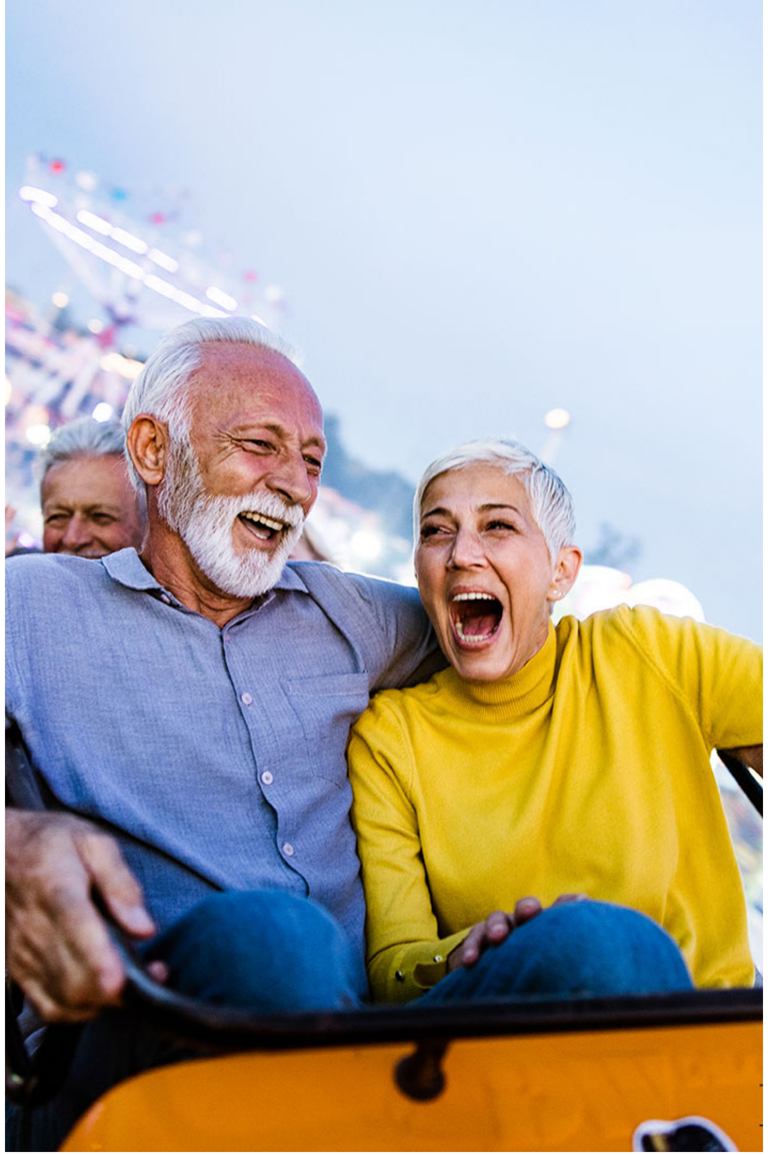
When reacting to investments:

Investments don’t move up and down at the same time

Diversification can help smooth the ups and downs of the market

Keep long-term perspective and goals in mind while viewing the performance of individual investments

Step 6



Have realistic expectations

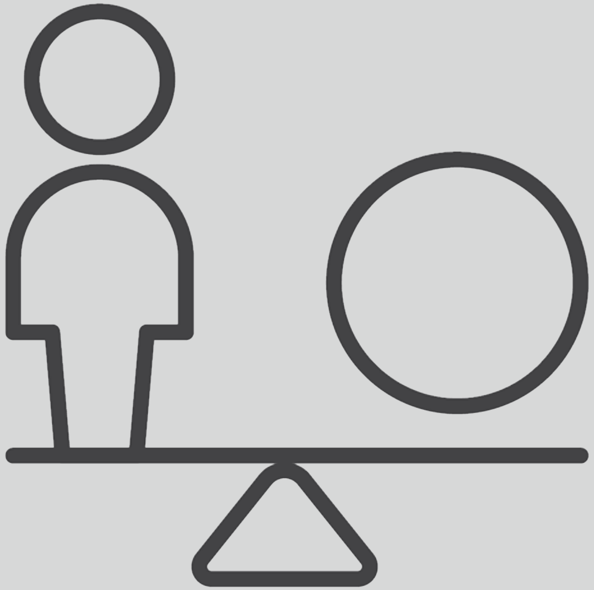
- What return do I need?
- Achieve your expectations

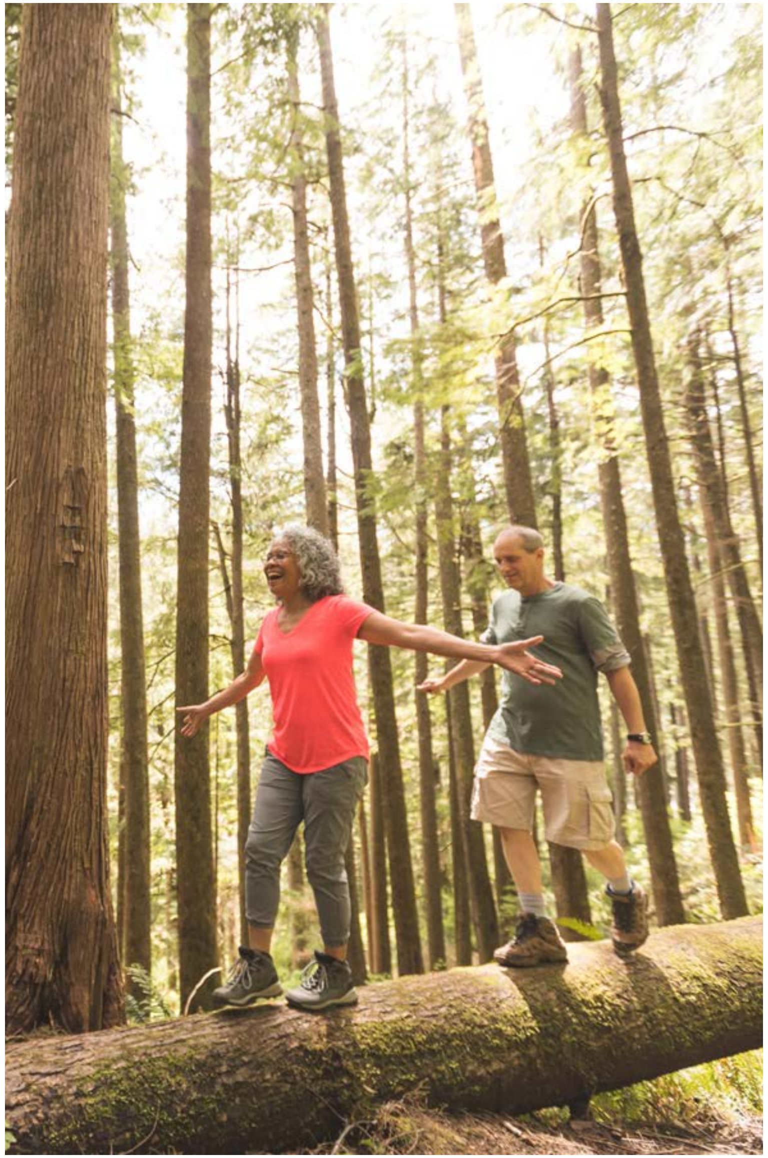
After setting expectations

Don't count on averages

Don't chase performance

Step 7





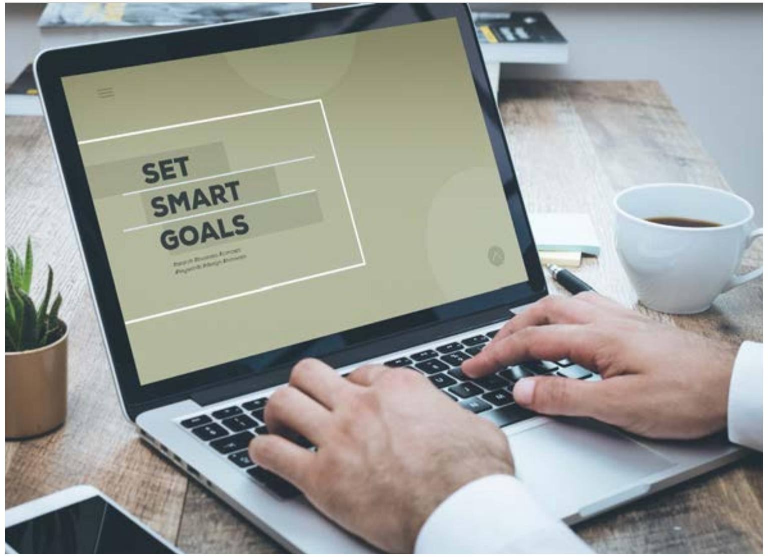
Maintain your balance

- Are you out of alignment?
- The benefits of rebalancing

Step 8

Prepare for the unexpected

- Establish a proper foundation
- Address risks throughout your life



How to prepare for the unexpected

Create an
emergency fund

Think about
insurance options

Plan an
estate

Step 9

Focus on what you can control

- Time-tested principles, not predictions
- Don't let emotions drive decisions
- Focus on your strategy

Step 10

Review your strategy regularly

- Stay on course
- More than just your investments
- Your periodic checkup

Recap: 10 key steps on the road to a solid financial future

Step 1: Develop your strategy

Step 2: Understand risk

Step 3: Diversify for a solid foundation

Step 4: Stick with quality

Step 5: Invest for the long-term

Step 6: Have realistic expectations

Step 7: Maintain your balance

Step 8: Prepare for the unexpected

Step 9: Focus on what you can control

Step 10: Review your strategy regularly

Questions & Answers

Edward Jones

Let's connect!

Email me directly if you have additional questions

Call my office

edwardjones.ca

Complete the **My Priorities Quiz** and bring it to your next appointment

How did I do? Complete the seminar evaluation

Thank You

Please complete your evaluation now

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2. Past performance is not a guarantee of future results.

3. Investment-grade bonds are those rated BBB/Baa and above by Standard & Poor's and Moody's. A bond represents a loan that an investor makes to an issuer in which the issuer agrees to pay the owner the amount of the face value of the bond at a future date, and to pay interest at a specified rate at regular intervals. Bonds are subject to yield and market value fluctuation. If a bond is sold prior to maturity, the amount received from the sale may be less than the amount originally invested. Bond values may decline in a rising interest rate environment.

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