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WEALTH MANAGEMENT



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## How to Define Your Investment Strategy

Whether you're new to investing or a bit more experienced, you probably already know there isn't a one-size-fits-all strategy for building a strong portfolio. Everyone's needs and goals are a little different, and before you make investment decisions, it's important to honestly review your situation.

Ready to start planning? Here's what to consider as you work towards shaping the approach that will help take you where you

want to be.

## **Define Your Goals**

Start by identifying the purpose of the money you want to invest. Do you plan to use these funds in the near future for a wedding, a home upgrade or college tuition? Or are you working with a long-term milestone, such as your retirement that's still years away?

Knowing your "why" helps pinpoint the "how" so you can more easily identify the right funding amount, investment type and variety of accounts to consider.

## **Stay Balanced**

Chances are, the goals you have today look different than the ones you had 10 or 20 years ago. It's normal for priorities to change, which is why it's crucial to review your goals every year to confirm that your investment strategy is still on track.

For example, ask yourself if your tolerance for risk has increased or lowered. A major life shift like marriage, divorce or a new career can create an opportunity or obligation that requires reworking your approach to saving, spending and investing.

## **Enlist Guidance**

When in doubt, reach out for assistance. It can be challenging to translate your hopes, dreams and lifestyle factors into an investment strategy that's truly a good fit, but you don't have to do it alone.

*Thank you for reading our newsletter!*

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