



August 4, 2020

When baking the perfect cake, you not only need all the ingredients, but you need to know the right proportions of the ingredients.

During this 2020 "shelter-at-home" time, our kids have gotten very involved in cooking family meals. They've gained a lot of confidence to plan, prepare, and serve meals they create.

Often, the food is quite edible!

Sometimes, there's an ingredient missing or clearly ingredients were mixed in the wrong proportions.

Your financial plan and your investment strategy are just like baking that delicious cake.

Your biggest investment strategy decision to make is what ingredients will go into the cake, and then what proportion you need to get the taste you're looking for.

The percentage mix you end up with is the deciding factor of how much volatility and potential growth or income your investments give you.

Though it doesn't get the exciting news headlines, this is 10x more important than "stock picking."



Interesting point on one of the above asset class ingredients (CASH): the avg interest rate of savings accounts in the US is under .1% per year and there is a strong possibility inflation will rise over the next decade.

If you'd like to get a professional to taste test your cake (review your investment strategy in detail), click the blue button below to schedule a conversation with us! We are here to help.

Sincerely,

*Chad W. Willardson*  
WEALTH ADVISOR FOR ENTREPRENEURS

**Certified Financial Fiduciary®**  
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Schedule a Call

