



February 22, 2019

Most "financial advisors" speak jargon to sound like everything is very complex and sophisticated. But when you break it down to the basics, there are only two reasons to invest money: either you want a cash flow income now or you want a cash flow income later.

Of course you'd love to have your investments both grow in value as well as provide you a great income at the same time. And yes, you can have different buckets of money for different purposes. However, choosing a primary goal of income now or income later provides clarity for your investment strategy decisions. Your goals and financial plan should drive your investment strategy,

After some conversation and analysis, we can quickly find out if your investment is aligned with your goals.

A couple potential reasons your investments don't match your goals: Maybe there wasn't great communication with your previous financial advisor. Or, maybe the investments you own were appropriate for a different time in your life...and your priorities have since changed.

I know it sounds very simple, but it's an important distinction. Are you investing for cash flow today or cash flow in the future? No matter whom you work with, it's important that you understand how your current investment strategy fits with your goals.

If you'd like to discuss this and get a checkup done, schedule a brief Goals Conversation® with our team by visiting our [website](#) today - no cost or obligation involved. You may also click [HERE](#) for our google reviews.

