



BEHAVIOR | GAP

May 1, 2020

For those that didn't panic sell your investments in March, you've just experienced (April) the best monthly stock market growth since 1987. For those that bit their lip and bought more during the volatile markets in March (exactly what we did for current [Pacific Capital](#) clients), you've done even better.

I just spoke with someone whose advisor told them get "more conservative" on March 23rd, so they sold out of most stock investments at the peak of the decline. *Yikes*. Your fiduciary advisor should act as a stable protector of your long-term goals. They need to be the buffer between you and big mistakes or emotionally-driven financial decisions.

If your advisor is not prepared, confident and proactively making moves for you during volatile times, then you are missing out. Not acting for the sake of activity, but within a plan. Volatile times emphasize the importance of a written Investment Strategy Guide®. Do not invest without having clear goals and plan first.

When the big storms hit, the time for preparation is already gone!

Sincerely,

  
WEALTH ADVISOR FOR ENTREPRENEURS

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