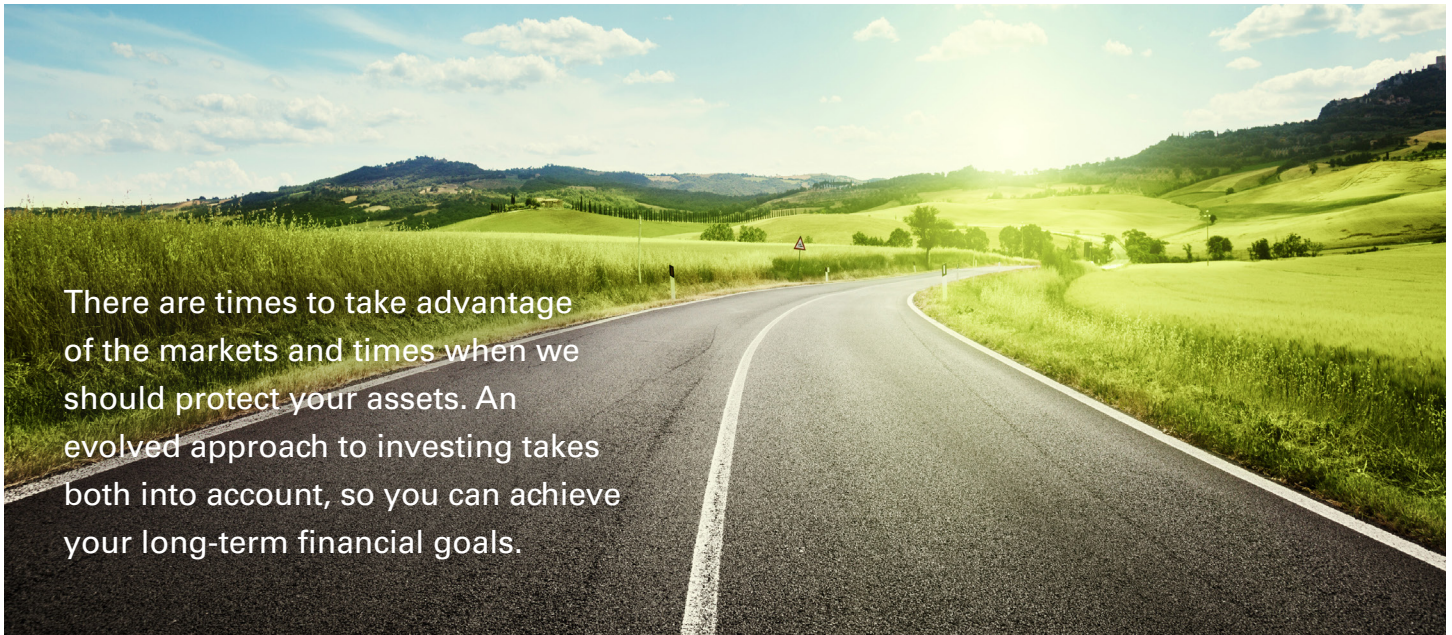


# Investing for Long-Term Success



There are times to take advantage of the markets and times when we should protect your assets. An evolved approach to investing takes both into account, so you can achieve your long-term financial goals.



**Define your goals:** with a destination in mind, you can be more focused.

▶ Align your investments with your financial goals.



**Build confidence about investing:** you'll become more educated about your investing approach.

▶ Understand what you own, why you own it and how it may perform.



**Understand your appetite for risk:** think about losses, how they make you feel and how much risk you're willing to take on.

▶ We'll talk about the possible outcomes upfront.



**Take comfort that your portfolio is aligned to your goals:** Make sure your investments reflect your goals and risk tolerance, while also helping you to take advantage of up markets.

▶ Investing has evolved, I can tailor a portfolio to help achieve your financial goals.

Let's talk about your long-term success.

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**Important Information**

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