

Working with a financial professional

The idea of being able to do your own financial decision-making has become popular. There is a common misconception that working with a financial professional has some sort of cost attached to it and may not be necessary. This could not be further from the truth.

You might often hear the term “robo-advisors”— where you put your financial data into a system, number crunching and calculations occur, results are printed and handed to you, and off you go! A more helpful way to help you on the road to your financial goals is to work with an experienced financial professional.

The Living Balance Sheet® believes that you’re a lot more than a number.

There’s no way to possibly know where life will take you or what the economic circumstances will be. The presence of an experienced financial professional, one who understands your full financial picture, can help lead you to the financial success you hope for.

What can happen if I don’t work with a financial professional?

- You might pay more in taxes than necessary.
- You could take more risk with your money than you probably should have.
- You could move through time with holes in your insurance portfolio that may not protect you, your life, or your balance sheet properly.
- You might not save enough and you might not live on a proper budget.



- You could be dragged down by costs of short-term debt.
- Your house payment might be too big.
- You may not be prepared to experience retirement the way you hoped.

You shouldn’t be a community of one.

You should enjoy the benefits of being part of a large community of Living Balance Sheet® clients who understand where they’re going, what they’re up against, and have a clear picture of how to help them get there.

Use The Living Balance Sheet® platform as your guide and work with a financial professional. Together they can help you build strategies, monitor your progress and adjust as needed.

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