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INVESTMENT CHECKUP

Maybe we should talk if...

- Have you experienced significant losses in your investment portfolio?
- What impact has the market decline had on your retirement plans?
- Has your advisor discussed your current and future investment strategy?
- Will there be money in your investment accounts while you are alive or will you run out during your lifetime?
- Has portfolio diversification shielded you from the market decline?
- How correlated is your investment portfolio to the stock/bond markets?
- Have you heard from your investment advisor recently?

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