



A Woman's Life Well Planned

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Getting Personal
by Wendy L. Sachs

Dear Ladies –

How well do you know your financial advisor? Or better yet, how well do they know *you*? And I don't mean 'you' plural, like you and your husband (if you're married) - I'm talking about you personally.

We get busy, and we forget that our investment accounts are not stagnant. Just like *you* are not stagnant. We change. We grow. We adjust. We get different hairstyles. Your investment accounts should reflect all of that... (well maybe not your hair style). Life changes and your investment portfolio may need to change along with it.

So how do you know? Well it starts with having a great relationship with your financial advisor. Everyone is different and everyone likes to be communicated with differently; some more frequently than others. But it's important to establish a foundation. Your advisor should have a solid understanding of your goals, your dreams, and your needs - both short term and long term. And then as life events happen, you need to feel comfortable calling your advisor and seeing if your investments need to be adjusted accordingly.

If you're not getting what you want from your advisor, maybe you need to consider your options. A great relationship with an investment advisor is more than just the returns on your statement. It's about having someone who can be there with you and help you walk through some of the major financial decisions in your life. If needed, they can show you different options and help

you talk through those big decisions to help keep you on the right financial path.

My advice is don't settle. If you want more than what your being given, it's ok to look for a better fit. You may also decide you like more than one advisor. Some people have more than one advisor for various reasons. And that's OK too. Just a word of advice though - make sure all your advisors understand what the other is doing so that there's no overlapping and overweighting you in a certain area.

If you feel like you need to change, ask around. Who have you met that you're comfortable with? Who are your friends using that they really like? Then sit down with them and talk to them. If you don't think there's a fit, move on and interview another one.

Remember this is about **you**. This is about **your** future and making sure that your assets are set up to best suit you. Don't settle for anything less.

Wendy L. Sachs

Financial Advisor

401 E. Sonterra Blvd. Suite 100 // San Antonio, Texas 78258

T 210.403.8500 // T 866.941.7379 // F 210.403.8599

Wendy.Sachs@RaymondJames.com

www.RoySachs.com

Raymond James & Associates, Inc., member New York Stock Exchange/SIPC

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