Wesh Financial

June Planning Focus

Jun 3rd, 4:41 pm

From: **me**
To: **Client**

Hi Mark,

Between April and June, we want to help you review your investments.

Perhaps you want to...

• Review the risk you are taking with your investments and want to consider adjusting your asset allocation
• Make a contribution to or withdrawal from an investment account; or
• Discuss the current market outlook, the Fed’s monetary policy, or oth er economic trends

Whatever the case may be, mid-year is a good time to review your portfolio to ensure your strategy continues to align with your needs and goals.

Careful investment planning is essential, but can be quite complex. Performance is just one consideration when reviewing your portfolio. Factors such as diversification, taxation, and fees can have a dramatic impact in any economic climate.

To assist you in reviewing your investments, we have a checklist that outlines over 25 key considerations to guide your analysis.

AREA CHECKLIST

• What Issues Should I Consider When Reviewing My Investments

FINANCIAL SUMMARY

Click the link below to review your Savings Plan plus Investment Action Items and initiate or complete any pending items:

MY FINANCIAL PLAN

Please let me know if you have any questions, or if you would like to Schedule a Client / Advisor 1:1 to address any concerns.

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MARLON T. WESH, MBA
Licensed Financial Advisor

+1(888) 221-7545
marlon.wesh@weshfinancial.com
weshfinancial.com | Calendar Link | Send Documents

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