



INVESTING IN YOUR GOALS

If there is anything worth investing in, it is that which is most important and most sought-after by you.

KNOWING YOUR LIFE GOALS

The first essential pass to being able to invest in your goals is knowing what your life goals are. What do you aspire to do, be or give? What are the driving forces behind your aspirations; the passions and purpose that fuel them? Are these aspirations thoroughly your own? How often do you reassess your goals to confirm that they still support your long-term plans both before and after retirement? It's important to take the time to respond to these questions and throughout the process of realizing your goals.

FINANCIAL PLANNING TO SUPPORT YOUR GOALS

Your financial plan's main purpose is to support you (financially) in living your Life By Design even after you've retired. Creating a well considered financial plan can make the difference in efforts you make toward reaching and enjoying your end goal. A financial plan can aid in the relief of stress and worries related to the financial markets and market events. Providing a clear vision of the long-term future, allowing you to enjoy the important things in life. Life By Design Investment Advisory Services believes in a holistic approach to Retirement Management. We execute this through a well-thought out long-term financial plan based on your risk capacity and Household Balance Sheet that focuses on Retirement Portfolio Allocations that account for growth, income, reserves and longevity.

INVESTING WITH PURPOSE

Socially Responsible Investing is the practice of investing in companies and funds that have positive social and environmental impacts. SRI can provide you with the opportunity to invest in your goals on grander scale. In this way, your personal actions are driven by your aspirations, and the actions of companies (and in turn the people connected with them) with whom you "partner" with financially are also. The choice to take part in social investment can impact your goals and the goals of others both in the present and future. The idea of not just investing in your own goals (micro-level), but investing in common goals (macro-level) can stretch your impact. Have you considered making the choice to be consciously aware of the impact your investment choices can have beyond your personal portfolio?

BEYOND YOUR GOALS

Creating a Legacy Plan can help ensure that your goals are carried on through the next generation, carrying on your passions and purpose for an everlasting impact. New branches of your family tree and leaves that have not yet grown can be greatly impacted by you choosing to invest in your goals today. Legacy & Estate Planning can provide you with more time to carry through on your intentions through future generations.

RETIREMENT LIFE BY DESIGN

A Retirement Life By Design is for many one of the biggest goals whether or not we have actually stated it to be. You will be hard-pressed to find someone who doesn't want to enjoy their retirement doing things they love and continuing to realize life goals without the shadow of financial concern surrounding them. Once you've identified your life goals and committed yourself to pursuing them to the best of your ability, you will want to think in the longest terms possible when planning.

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