



# Diversify Your Assets, Not Your Advisors

Over time, you may find yourself with multiple investments accounts, with more than one advisor, at more than one institution. While diversifying your investments in your portfolio is important, it doesn't mean you need to diversify the advice you receive. This kind of diversification may pose a headwind to performance.

While it may seem logical to get multiple opinions on the investment landscape, it's far more effective to have one person who understands your goals and has a clear view of your investments, rather than you having to manage multiple accounts with a variety of people and institutions. With one financial professional who has a holistic view, your wealth can be invested under a unique comprehensive plan that ensures an in-depth understanding of your current situation, which reflects your objectives and matches your vision.

## **Benefits of One Team Taking Care of Your Wealth:**

It's critical to keep an eye on the big picture. If you have multiple advisors, they may be approaching your future from differing angles. This can cause confusion and, ultimately, you could end up working against yourself, rather than moving your entire portfolio towards the same end-goal.

Consolidation can help reduce the risk of unintended overconcentration in your portfolio. With assets spread among multiple institutions and advisors, the chance of inadvertently owning too much of certain segments of the market is much greater than if one person were overseeing your total portfolio. You need one advisor who can simplify the process and ensure you aren't over-investing in a particular area and under-investing in another.

With one advisor quarterbacking your investment portfolio, they can build a specialized team of experts which can provide you with diligence and discipline throughout market cycles and milestones, including enhanced services in tax and estate planning.

Equally important, all investments under one roof add up to a larger sum, which provides you with potentially more buying power when opportunities arise. In addition, management fees typically decrease as assets increase.

Another benefit to consider is that if you were to fall ill and could not handle your affairs, it's much easier for your spouse or power of attorney to manage your assets if they are held in one place.

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Your road to financial freedom is best paved going in one direction. Streamlining your investment accounts with one advisor can help create less interferences to your long-term destination. You've taken great care to grow your wealth, let our team help you further your vision and your legacy.

**Talk to us today** to discover how we can help.

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*"Money itself, is a meaningless commodity – merely a means to an end. What is most important, is what your money means to you and your goals for it."*

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