



# 5 Steps to Better

## INVESTMENT PERFORMANCE

**The noisy world of investing makes it hard to know where your money should go and feel confident your portfolio is managed the right way.**

### PRESENTATION HIGHLIGHTS

The truth is one bad investment can erase several years of hard work. In this cut-to-the-chase presentation, Reese Harper, CFP® brings a complicated subject down to earth and explains how to overcome the costs of:

Irrational investor behavior

Hiring the wrong advisor

Underestimating risk tolerance

Poor investment selection

A mismanaged portfolio

### OBJECTIVES

Understand how financial markets work

Identify and overcome behavioral tendencies that lead to poor investments

Know the questions to ask when hiring a financial advisor

Learn the principles followed by world-renowned economists

### DURATION

2 hour full presentation

May be modified to accommodate shorter meeting times

### FEATURES

Behavioral science demonstrations with audience participation

Sample portfolio review

Open Q&A throughout presentation

### AUDIENCE

Dentists and spouses



“

*Very engaging, smart, and informative! You converted a scary and foreign topic into something my brain can understand.”*

- Dr. Gina Marcus CORAL GABLES, FL



To book Reese for your next event visit: [DentistAdvisors.com/speaking](https://DentistAdvisors.com/speaking)

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