



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



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