



What you own, owns you. Or, does it?

To our clients, colleagues and friends,

The unexpected cold snap this week caught me unprepared. Winterizing my residence and an investment property was not at all convenient. Daylight hours have gotten shorter. I couldn't wait until the weekend for fear of the freeze. I could have paid an expert, but they were all booked. I was reminded of the sage advice a board member once shared "What you own, owns you."

I immediately thought how thankful I was that my office building contracts out this type work. I was happy the owners association paid for that convenience.

As the sun was setting and the temperatures were dropping I wondered how much longer I would be able to physically do these routine tasks? More importantly, how many more seasons would I have the desire? Is it really the best use of my time and talent? With a commitment to a little insightful planning I could have scheduled someone else to do this work.

So it is with managing financial assets, as well. If it's time for you to seek professional help managing your portfolio, contact me for a free portfolio review and proposal.

Please read below and share your feedback so we can learn how to better serve you.

Sincerely,

Roger C. Nagel CPA/PFS, CMA, CGMA

From our Friends at Archer Investment Corporation.

Read expert opinion on current market conditions.

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