

# DOES YOUR INVESTMENT ADVISOR ADD VALUE?

If you rely on your advisor to answer this question, you may be letting the fox guard the henhouse. My *Forensic Advisory Package* can provide an objective answer to this question via my three-step process:

## 1. MEASURE PERFORMANCE

I first compare your portfolio's performance to standard indices for stock and bond markets (e.g., S&P 500™). This provides a general litmus test for overall performance.

## 2. ADJUST FOR RISK

I then measure your portfolio's *risk-adjusted* performance. This accounts for the risks and strategies (e.g., volatility, value, growth, income) specific to your portfolio.

## 3. CALCULATE FEES

Lastly, I add up the fees and commissions you pay to various parties (advisor, funds, 3<sup>rd</sup>-party managers, etc.) to establish your *total* cost of wealth management.

My objective analysis lets you weigh the fees you pay against potential performance benefits you may realize. While advisors also provide some intangible benefits, your returns still reflect a critical element of their performance.



In addition to analyzing performance and fees, I can also help you assess your overall goals and investment strategy. This may be important as some advisors only explain their own firm's strategies or push products paying them the best commissions. As an independent and fee-only advisor, I can provide you with a broader and unbiased perspective on what options are available and help you determine which are best for you.

## CALL AARON FOR A FREE, NO-OBLIGATION CONSULTATION

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