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About Us

Partners in Financial Planning, LLC is a Southwest Virginia-based fee-only financial planning and investment management firm. We strive to provide you with the highest level of personalized service and advice based solely on your best long-term financial interests. Our lead financial advisors are all CERTIFIED FINANCIAL PLANNER™ professionals. We serve many clients in the greater Roanoke Valley and New River Valley areas, including Salem, Lynchburg, Lexington, Blacksburg and Christiansburg – as well as clients in West Virginia and across the U.S.

Investment Commentary

Q2 Investment Commentary

How to make sense out of the recent market behavior? We experienced a painful decline in the last month of 2018 before the markets took a sharp (and unexpected) about-face and delivered the biggest one-quarter gain since the third quarter of 2009. The surprise upward trend has continued through the second quarter, albeit with more modest gains, despite what would normally be considered warning signs in the economy, the global trade markets and corporate earnings.

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May Investment Commentary

Stocks fell sharply in May, closing out their worst month since last December. Each of the benchmark indexes posted month-over-month losses exceeding 6.5%. While market performance has largely swung on trade rhetoric, it appears investors have reached their boiling point and are moving away from stocks and floating toward bonds, pushing yields on 10-year Treasuries down (-37 bps in May) as bond prices soared. Oil prices fell sharply on trade tensions and a slowing Chinese economy. For the month, small caps and tech stocks lost almost 8.0%, followed by the large caps of the Dow and the S&P 500. Year-to-date, only the Nasdaq remains more than 10% ahead of its 2018 closing value.

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April Investment Commentary

As April came to a close, each of the benchmark indexes listed here posted strong monthly returns. In fact, for several of the indexes, April brought to a close the best four-month stretch in many years. Both the Nasdaq and S&P 500 reached new highs during the month, as investors were encouraged by a shrinking trade deficit, favorable economic projections, low inflation, and stable interest rates. The Nasdaq led the way, nearing a monthly gain of almost 5.0%, followed by the large caps of the S&P 500, the small caps of the Russell 2000, the Global Dow, and the Dow, which gained over 2.5% for the month. During April, consumers saw gas prices climb as oil prices continued to soar.

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