

Does My Portfolio Fit Me? (<https://pro.riskalyze.com/embed/1d3f800d5326b1e3af1e>)



## CORE VALUES

- Vision: We will create a plan that incorporates your dreams and goals.



- Trust: Trust is the basis for all relationships. Our recommendations are made with your best interest as the (http://atlaswealthpartners.com)
- Doing what you should when you should do it. Our reputation, our most valuable asset, is strengthened by our culture of openness, responsibility and honesty.
- Caring: We want you to be successful and enjoy your experience.
- Education: This is a lifelong process that is driven by the desire to understand. We continually seek wisdom in the application of our craft. We strive to identify the important factors that affect you and clarify your understanding of those factors. search
- Systemization: The process of delivering intended actions and results on a consistent and repeatable basis. Does My Portfolio Fit Me? (<https://pro.riskalyze.com/embed/1d3f800d5326b1e3af1e>)



## CORE PRINCIPLES

- Your true wealth is your time and your freedom
- Your greatest investment is in your own education
- A written financial plan that outlines key goals and the means by which those goals will be achieved is a necessity
- We believe you should invest your time creating your plan before you invest your money
- We believe that successful investing is the process of rational decisions overcoming emotional urges
- We believe that there many different kinds of risk that must be understood and evaluated when making financial decisions
- Leverage will not make a bad investment good, but it can make a good investment bad
- Being a contrarian is a lonely yet profitable endeavor



## BENEFIT STATEMENT

- Your time is freed up to focus on your interests and passions
- You sleep well knowing you are prepared for good and bad conditions
- You have a sounding board for all of your financial decisions
- A written plan with a trusted advisor ensures that your wishes are possible even in your incapacity or absence
- You relieve yourself of the burden of choosing and monitoring investments



(<http://atlaswealthpartners.com>)

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