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5 Important Considerations in Understanding Financial Advice: Being a Fiduciary, Advisor vs Broker

By: Steve Economopoulos, CFP®, ChFC, CMT

June 20, 2019

One of the major developments in the Financial Services Industry in the past few years is the regulation and law surrounding how investors are to be educated about the differences in working with a Broker versus an Advisor versus a Planner. It can be very confusing but can be the most important aspect in developing the trust necessary for a positive experience for the investor. With a new law recently passed (June 5, 2019) by the SEC, here are 5 items to consider as an investor and questions to ask your financial professional...

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By: Steve s, CFP®, ChFC, CMT
February 15

The last q vas another reminder to us how easy it is for gain to turn into loss a ırn into fear. As you often hear from me and my team, we believe th ın the goals of your plan and map it to your feelings of risk (by engaging with us in completing your own Investment Policy Statement), we can provide you an investment portfolio that can get you through the tough times. There are not too many things I can guarantee to you as clients, but I can say that the market will continue to move up and down and we will see bear markets (20% or more decline) and corrections (10% or more decline) as you move throughout your financial lifetime...

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At Econ Wealth Management, we're proud to be squarely on the side of our clients. Our structure, culture and commitment to your success are all aligned to put your interests first and help you succeed.

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