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## LATEST UPDATES



### 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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### 5 steps to Getting Through Market Volatility: How to Conquer Your Fear as Investor



By: Steve Economopoulos, CFP®, ChFC, CMT  
February 1st



Steve Economopoulos, CFP®, ChFC, CMT

The last quarter was another reminder to us how easy it is for gain to turn into loss and for optimism to turn into fear. As you often hear from me and my team, we believe 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...  
in 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.

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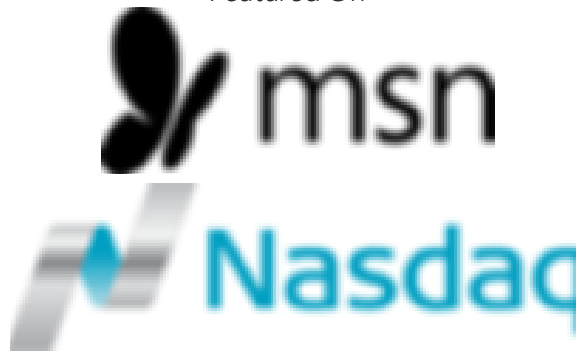
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Use 'relative strength' to your portfolio's advantage

*CNBC*  
By: Steve Economopoulos, CFP®, ChFC, CMT

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How to Protect Your Portfolio in a Volatile Market

How Fed Rate Increases Impact Investors

*Nasdaq*  
By: Steve Economopoulos, CFP®, ChFC, CMT

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Holding Cash Instead of Chasing Investment Returns

*Yahoo Finance*  
By: Steve Economopoulos, CFP®, ChFC, CMT

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Econ Wealth Management is an independent practice that combines comprehensive wealth planning, discretionary portfolio management, and top-notch service to help clients achieve their financial goals and dreams.

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## OUR TEAM

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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We are here to assist. Contact us by phone, email or via our social media channels.

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