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# **CUSTOMIZED PORTFOLIOS**

Develop portfolios based on a client's goals, needs, and risk tolerance.



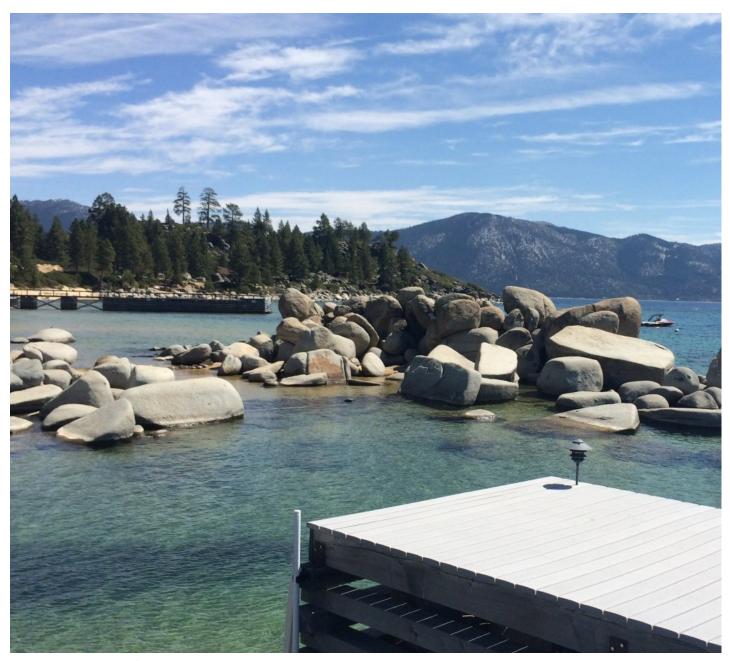
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### THE BULLDOG BULLETIN 3RD QUARTER 2018

#### SQUEEZED BY COMPETING NEEDS

RISK TOLERANCE — Carefully assess your tolerance for risk so

As life expectancies continue to rise, it becomes increasingly likely that you may need to help an aging parent. Some financial precautions you should consider now include:

REVISIT YOUR ASSET ALLOCATION

MCVISIT ACLOUATION

on should reassess your asset

allocation periodically. To do
so, follow these steps:

1. RYWIW YOUR DISBRID ASSET
ALLOCATION PERCENTAGES. When designing your investment strategy,
you probably decided what percentage
your probably decided what percentage
till recent investments. Review those
percentages to see if they still make
sense for your situation. Over time,
how much you want to allocate to
ask percentage in the process of th

you invost in assets you are con-fortable with.

O RITURE NUTCHIONS — You need to set realistic return espectations to set realistic return espectations you need your investment goals. While past performance is not a guarantee of future results, reviewing historical rates of return can help you assess whether your return expectations are reasonable to the property of the propert

FR2018-0521-0004

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