

Emerald Connect | second-opinion-video

Hi, I'm Casey Frye.

And I'm Jared Wurm.

We want to take a few moments today to give you a quick introduction to our free second opinion services.

[MUSIC PLAYING]

Over the years, we've been introduced to many prospective clients who lack confidence in the investment advice they had received.

Or in the investment solutions they had purchased.

As certified financial planner professionals, we're in the business of helping folks cultivate financial confidence through a well thought out plan and sensible investment solutions.

Yet, doubt and uncertainty can creep in, and it can undermine the confidence you need for achieving your financial goals.

Our free second opinion services are an opportunity for you to get an additional experience perspective regarding your portfolio's overall investment strategy.

It's a chance for you to get an independent set of eyes on your plan and evaluate your investment's actual total costs, including potential hidden fees.

We will evaluate your portfolio's actual downside risk, so you can get a sense for how your portfolio could behave in a variety of market conditions. Many investors don't even know how their downside risk is measured. It's an eye opener for some.

We will also evaluate your portfolio's investment overlap or true diversification. Over the years, we've seen many investors who believe they were achieving broad diversification by having multiple investments spread over multiple firms, only to discover they're hardly diversified at all.

Maybe you have an annuity. There are many different types. And perhaps you're not even sure how yours really works.

Or what it really costs.

Right. We can impact the benefits, the features, and the costs of your annuity, so you can better understand what it is you have.

It's possible you're not confident in your long-term plan.

It's also possible you're totally aware that you're flying by the seat of your pants.

In either case, we can help evaluate your current strategy or help you formulate one.

If you're intrigued by this complementary service, and you'd like to learn more, our contact information will be available at the conclusion of this video, and you can learn more about our complimentary second opinion services by visiting our page.

You should really consider taking advantage of this free service. You deserve to be confident in the steps you're taking, and if we discover your current steps are leading you towards your goals, that's great.

But if your strategy is leading you towards a buzz saw, you certainly deserve to know that, too. We'll share and explore all with you, the good, the bad, and the ugly.

We would welcome the opportunity to discuss your specific situation further and to unpack all of the ways that we can help you with trustworthy advice.

And exceptional service. Thank you for watching. Until next time.

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