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Our Lifestyle's Financial Expert

HEARTS OVER CHARTS

The process of investing is dull and boring. Choosing investment funds, making regular contributions to them, and keeping an eye on how they perform is all numbers-based, with a few charts thrown in for good measure.

It's not the charts that should put a spring in your step. The outcomes of investing is where the magic happens. Investing wisely over many years results in wealth you can spend to maintain your lifestyle and create meaningful experiences and opportunities. The outcomes of investing impact areas that are dear to our hearts - family, friends, experiences and causes we care about. So, while the numbers and charts are important, it's worth remembering what outcome you are working towards - there's little point in creating money and then not putting it to good use!

Understanding this can impact the way we approach our financial decisions. Instead of seeing every goal as a maths problem, we can open the decision-making process to the elements that lie in the heart, not just on the chart.

Most situations have more than one

reasonable response. By slowing down and taking stock we can ask ourselves questions that open our eyes, widen our horizons, and lead us to consider options we may have missed if we only focused on the charts.

The next time you need to make a financial decision, force yourself to discover the elements relevant to the challenge that may not be visible on a chart but instead come from the heart.

This approach will likely lead to fewer long-term regrets and a more fulfilling life. Money is not a maths equation, and not everything needs to be optimised. In my view, it's hearts over charts. Money is important, but the real-life outcomes that result from money are what should excite us.

We can guide you through the valuable exercise of considering both the technical (charts) and emotional (hearts) aspects of making important financial decisions.

If you are interested in knowing more about how I work and you have investments of over £200,000 why not give Jo a ring on 01562 745730 to arrange a no obligation 30-minute free meeting in our office.

The information in this article does not constitute investment advice; you must not rely on the content when making investment decisions without taking advice. Past performance is not a reliable indicator of future results. The value investments and the income from them, may fall or rise and investors may get back less than they invested.

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- Want to really understand what you have?
- Want to leave a legacy for your children and grandchildren?
- Want to know how much you need to be able to retire securely, maintaining a good standard of living?



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