

INVESTMENT STRATEGIES

- _____ Confirm that your investment portfolios align with their appropriate risk tolerance and time horizons.
- _____ Consolidate your retirement plans if that proves advantageous.
- _____ Determine whether it makes sense to protect a portion of your investment portfolio to help add stability to your long-term retirement income.
- _____ Establish a system to monitor and rebalance your retirement portfolios to ensure that they stay within their appropriate risk allocations.