



Your investment philosophy

Putting your principles into practice

What is an investment philosophy?

Your investment philosophy is a set of investment beliefs and principles that guide the strategies you use to invest client funds. It is a strategic way of thinking about markets, provides direction and acts as a framework for investing.

Running a financial planning business without a well thought out investment philosophy is akin to steering a rudderless boat. Having a clearly defined investment philosophy for your advice practice will help you to better articulate to clients the rationale for your decisions and recommendations, support your client conversations, as well as your own investment decisions.

Developing an investment philosophy can add immediate value.

Articulating your investment beliefs and processes should be a priority for all professional financial planning practices and is an important part of business planning. It allows you to:

- Reflect on your own experiences and beliefs.
- Concentrate research only on the investment choices in your preferred methodology.
- Work more closely with preferred product providers.
- Share your philosophy with strategic and referral partners.
- Allocate the right amount of time and resources to the construction and review of investments.
- Match the right philosophy to each client segment.
- Consider other aspects, such as tax and rebalancing strategies.

Please refer to the Practice Development page
and fill out the form to request the full guide.

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<p>1. The first part of the document discusses the importance of maintaining accurate records of all transactions and activities. It emphasizes the need for transparency and accountability in financial reporting.</p>	<p>2. The second part of the document outlines the various methods and techniques used to collect and analyze data. It includes a detailed description of the experimental procedures and the statistical analysis performed.</p>
<p>3. The third part of the document presents the results of the study, showing the trends and patterns observed in the data. It includes several graphs and tables to illustrate the findings.</p>	<p>4. The fourth part of the document discusses the implications of the study and the potential applications of the findings. It highlights the significance of the research and its contribution to the field.</p>
<p>5. The final part of the document provides a conclusion and summarizes the key points of the study. It also includes a list of references and a bibliography.</p>	<p>6. The document concludes with a statement of the author's contact information and a declaration of the originality of the work.</p>

What Types of Psychological Disturbances Should I Consider?

Consider the following:

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THEORY OF THE EARTH

The theory of the earth is a branch of geology which deals with the origin and development of the earth and its various parts. It is a science which seeks to explain the processes which have shaped the earth and its features.

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