

ARE YOUR CURRENT INVESTMENTS APPROPRIATE?



A second opinion can give you a fresh look at your financial portfolio. We can help you confidently answer the following questions:

Is your portfolio designed to adapt with your changing needs?

Are you comfortable with your current risk level?

Are there new opportunities available for you to consider?

Do you know how long your portfolio is designed to last?

Are you receiving the right financial guidance for you?

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Advisory services offered through 3dhWealth LLC doing business as 3D Holistic Wealth, a Registered Investment Advisor.

Contact us at 949.997.1101 to schedule a review.



NEED A
FRESH LOOK
AT YOUR FINANCIAL
PORTFOLIO?

WHY SEEK A SECOND OPINION?

Over the years, needs change as you experience transitions with your health, family, job, and financial situation. You need a financial plan that is able to adapt to your needs and with the ever-changing financial markets.

If you are not sure you are receiving the advice and expertise you need, you should seek a second opinion.

We are pleased to give you an objective review of your portfolio. We provide this review without requiring any obligation on your part.



Our review process is designed to determine if your current financial portfolio is properly structured to adapt to changing needs.

1 We get to know you

Before we even look at your current portfolio, we spend time getting to know you by asking questions about your family, health, and investment needs. We listen carefully as you explain your financial goals so that we can analyze your current portfolio and needs.

2 We help you create a plan

Having a written plan adds clarity to your financial goals and expectations, and helps you monitor your portfolio's performance. We recommend a tailored investment policy statement, which is a general outline for the creation of your financial portfolio. It contains detailed information on your investment objectives, time horizon, and risk tolerance. We also recommend an appropriate asset allocation strategy with the right balance of growth, income, and security to help achieve your financial goals.

3 We analyze your current portfolio

Next, we analyze your current portfolio by combining your investment objectives with our financial expertise and knowledge of current market conditions.

Upon completing your evaluation, we offer our best opinion on the quality and suitability of the investments you currently own.

This is where we answer questions like:

- How do we view your stocks, bonds, and mutual funds?
- Is there an appropriate mix of fixed income and equity holdings?
- Is the risk level suitable for you?
- What changes do we recommend?

4 We look at the big picture together

Finally, we take the results of our analysis and compare it to your financial objectives and goals.

It is our hope you will go home with a sense of comfort knowing your current financial portfolio is properly structured. If you feel our review was satisfactory and would like to continue a relationship, we would be privileged to help with the future management of your portfolio.