



# What can a financial professional do for you?

You often seek guidance for things that you consider important – like your health – and tasks that you have little patience for –like technical support. You turn to trusted professionals with the expectation that they have your well-being and best interests in mind. Managing your financial life shouldn't be any different.

An experienced financial professional has the training and insight to:

- Help identify and understand your reasons for investing
- Deliver tailored solutions designed to meet your short- and long-term needs
- Explain how different investment vehicles function and support your financial plan
- Navigate the fluctuating financial markets
- Keep you focused on your long-term goals

**70 percent** of people who work with a financial professional say they are on track or ahead in saving for retirement, compared to just 41 percent of people who don't seek help from a financial professional.<sup>1</sup>

At 3D Holistic Wealth, we help you live comfortably today and protect your legacy for the future. We believe that the best results start by having an agreed upon plan that is all your own. Analyzing your financial goals, what's important to you as an investor, your attitudes toward investment risk, and time horizon enables us to better understand your needs and identify appropriate financial strategies. Working together, we'll develop and implement a solid plan focused on your life goals. Our relationship doesn't end there. We are passionate about helping our clients succeed in attaining their investment goals. We personally meet with every one of our clients on a periodic basis to discuss concerns and the potential impact of market volatility on their portfolio. This time is also used to celebrate successes, such as paying off student loans, purchasing a vacation home, or setting a retirement date.

If you're interested in working with an experienced financial professional who is passionate about working in your best interests and helping you achieve your goals, contact 3D Holistic Wealth [dgoyal@3dhWealth.com](mailto:dgoyal@3dhWealth.com) or 949.997.1101.



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<sup>1</sup>John Hancock Investment Management, "The benefits of working with a financial advisor," 2019