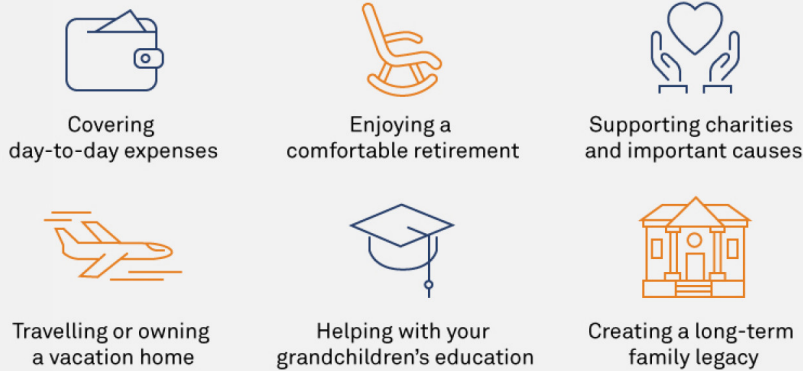


# Create an Objective-Driven Investment Strategy

An investment plan that's tailored to your needs can bring you peace of mind, allowing you to maintain a long-term approach to managing your wealth and avoid making emotional decisions that can hurt your portfolio's performance.

## Identify Your Investment Goals

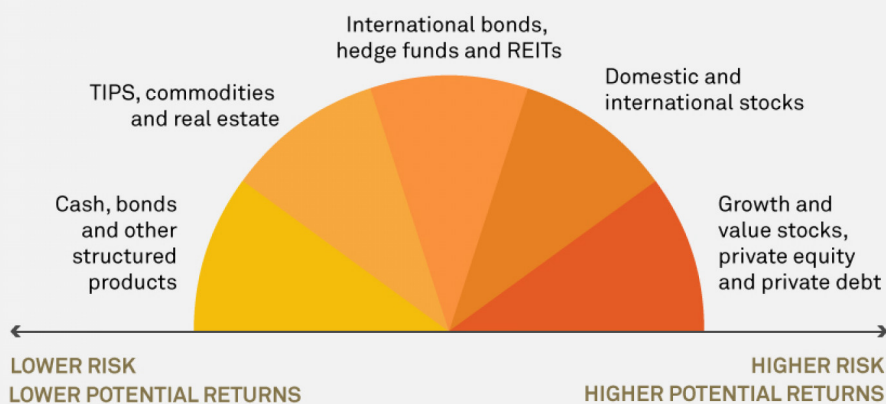
Are you looking to support a certain type of lifestyle, or do you want to leave a legacy for future generations? Your goals might include:



Once you pick your goals, you can figure out what level of return you would need to achieve them – and how much risk you might need to take on to get there.

## Understand the Role That Risk Plays in Investing

Whatever your goals are, it's important to manage risk by spreading investments across a variety of asset classes.



An investor who is more interested in satisfying their current lifestyle needs may benefit from more conservative, income-generating investments.

Those looking to build wealth and leave a legacy may want to take on more risk in pursuit of higher overall returns.



## Goals + Risk Tolerance = Investment Plan

By clearly stating your goals and understanding the risks involved in pursuing them, you can develop an investment plan that gives you the confidence to stay on course in the face of market volatility.