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Holiday Season Is Here

It truly is amazing that in one day the final month of the year will be upon us. Each year it appears time increases its speed. This is also the time of year in which children make lists of all the new toys that they hope to unwrap in the very near future. As I was thinking of a topic to write on I thought how fitting would it be to write down what investors "TRULY" want.

I put the word "truly" in all caps for a reason. The reason is that in my experience investors will tell a variety of needs and wants from their portfolio ranging from huge returns to little risk and everything in between. A great majority of the time these investors don't want what they request, a fact that is always uncovered in the future. I honestly believe that all investors want to seek financial comfort. And trust me "financial comfort" is not always "financial perfection". This might be a light-hearted white paper with a holiday theme; however, let me stress that it took me a very long time to understand the difference between the two.

There is an old saying that "Cash is King" and that saying is unmistakably accurate. In my experience, there is no better way to provide a lifetime of comfort than to show a client that their monthly inflows of cash is higher than their outflows. We here at Aventail spend a great deal of time doing just that. We also implement it in a variety of ways, some of which most people don't even consider.

So, if during the holidays your financial comfort is not exactly squarely in place, come meet with us. We will ascertain what your true financial comfort is and more importantly we will show you exactly how to wrap it up in a box and put it under the tree with your family's name on it!

On behalf of the entire staff we wish you and your entire family a wonderful holiday season!

Best regards,

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"Helping you find and maintain a lifetime of financial comfort"

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