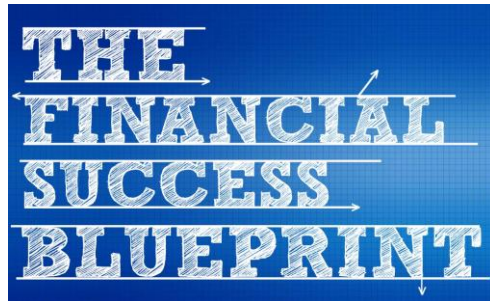


What is an **Investment Policy Statement (IPS)?**

It is a written document that serves 2 major functions.

1. It's a blueprint in building your investment portfolio.



and...

2. It becomes a written business plan in the ongoing strategic management of your investments.



The great football coach Vince Lombardi left nothing to chance and created masterful game plans for his team that took into account every possible eventuality of the game – in advance.

In other words, good or bad, he always had a plan to guide him to victory. He never panicked.



That is exactly what an investment policy statement can do for you. It lays out the game plan for ANY and ALL market outcomes.

No matter what happens to the market, you are prepared ... in advance!

What your IPS tells you:

- It spells out how much risk you are taking.
- It spells out how much return you are targeting.
- And it spells out your time horizon.

If your investment advisor has not given you an IPS for your portfolio, that is a serious flaw in your investing process.



An MRI of your portfolio reveals the truth about your risk and rates of return. Check our web site, and watch the video.

Woodie Montgomery, RFC, CEC

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