

WHITE KNIGHT CONSULTING LLC



HAS YOUR **FINANCIAL ADVISOR** GIVEN YOU **A CALL?**

OCTOBER 2020



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Have you spoken with your financial advisor recently? With all that is going on in the world today, it's important to work with a professional who will reach out to you and discuss current issues and financial strategies during times of stress.

You might be worried about preserving your wealth in a time of uncertainty. The global COVID-19 pandemic has created tremendous economic disruption, as some companies are finding themselves busier than ever, whilst others are struggling to survive.

Of course, there are other issues contributing to market volatility, including economic stimulus proposals for consumers and small businesses, as well as potential changes in U.S. tax policy after the presidential election and the election itself.

Meanwhile, the Federal Reserve has signaled its desire to maintain rock-bottom interest rates for at least the next year. Which may make personal and business loans more attractive, whilst reducing returns on fixed-income assets.

For high-net-worth individuals and families, economic and financial uncertainty presents both challenges and opportunities. If your primary concern is wealth preservation, your financial advisor might recommend rebalancing your portfolio away from volatile assets. In some instances, there may be some hedging strategies that could reduce downside risk.

You may decide to pursue a growth strategy or your advisor might suggest other approaches, depending on your personal goals, time horizon and risk tolerance. Finally, you may wish to look at using low-cost debt to purchase tangible assets, such as real estate, with the potential to appreciate significantly in the years ahead.

Another issue to consider is the future of technology stocks, such as Apple, Amazon and Alphabet (Google's parent). Since the pandemic outbreak this spring, these big tech stocks, along with consumer goods companies, have been largely responsible for sustaining Wall Street's overall performance. In contrast, airline, hospitality and service companies have suffered significant drops in market value.

How will these different sectors perform in 2021? Is it time for you to look for undervalued companies and pick up shares at bargain prices? Should you rebalance your accounts, as they may have become overweight to technology stocks? Maybe you simply hold tight or make minor adjustments until global trends become clearer?



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All these are excellent questions to discuss with your advisor, even if you take a hands-off approach to the relationship. Regardless, during times of volatility and stress, you should expect to hear from your financial advisor or wealth manager and if you have not, it may be time to consider a change in your professional relationships. If you do decide to look around, be sure to do your due diligence to avoid making the same mistake again. As an outsourced chief financial officer, I have helped many wealthy clients go through the process of selecting a suitable advisor.

Samy Dwek is founder and CEO of White Knight Consulting LLC a Delray Beach firm that provides professional guidance and outsourced chief financial officer, chief operating officer services to high-net-worth individuals and families.

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