

Decisions

We believe the root of the problem revolves around *how* we make financial decisions. Let's begin with how we make most financial decisions.

Typically, we make them one at a time, at different times of our lives with different financial professionals who are looking at our lives from only one perspective trying to resolve a problem, solve for a need or fulfill a goal.

We then make the best educated guess we can from the information we've gathered or are presented with. Many times, after the decision's been made, we file it away, and it may be years before we revisit it again. Eventually, this creates a "Financial Junk Drawer" of disorganized products and strategies, uncoordinated with very little connecting and flowing together.

How can we truly create wealth, happiness and success working in this manner?