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BD20 9QP .

Company status

Dissolved Dissolved

on 12 January

2016. Company

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- Overview (free ...

How to Become

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Advisor Understand
your goals and
create a savings
plan to achieve
them. By far the
most important step
to getting started is
to... Have a debt
repayment plan.
You may have
already addressed
this in the previous
goals section, but if
not, you need to...

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Financial advisors

cost a lot of money.

Learning to be your

own advisor may

save you time,

money, and hassle.

Those who spend

more time thinking

about saving

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money, investing
well, and becoming
financially
independent are far
more likely to
actually do it than
those who only
think about these
subjects twice a
year.

8 Reasons You
Should Be Your
Own Financial

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Advisor

Key Takeaways It's imperative today to make sure your personal finances are in order, from retirement saving to tax planning—but doing... Professional financial advisors help alleviate that burden with skilled and knowledgeable advice and practice,

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but this... If you
want to do it
yourself, you'll ...

Financial Planning:
Can You Do It
Yourself?

Most Canadians
have basic financial
planning needs. An
employee who is
not in the executive
suite, and most
retirees, likely have

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basic financial
planning needs.
Financial advisors /
planners are trained
for complex
financial planning
cases and their
charge reflects this.
The cost of their
advice is much
higher than the
value of their
advice for
Canadians with

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basic financial
planning needs.

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and costs. See how
they change over
the years. Change

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you can show,
share and
understand ideas
together.
Sophisticated,
simple, clever
software.

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The theory of what a financial advisor can do for you is straightforward. He asks you a set of questions about your savings needs and recommends a set of investments that will fulfil those needs. Then the advisor should tell you how to monitor

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those investments,
or depending on the
level of service, he
should monitor
them for you.

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Value Research
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Choose to be Their
Own Financial
Advisor #1 Cost.
At first, they

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argued advisor fees are too expensive. Here ' s the truth, though: fees range anywhere from 0.5% to 2%. However, most are typically between 1% and 1.5%. Many investors who choose to hire advisors feel the fee is worth it.

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Can You Really Be
Your Own Financial
Advisor? Yes and
No.

A robo-advisor is a
digital software
platform that
creates investment
portfolios with a
simple algorithm.

When you sign up,
the robo-advisor
will ask your age,
risk tolerance,

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current retirement
savings, and
desired age of
retirement. Then
they determine
what you should be
investing in and
exactly how much
you should save
every month.

How To Create A
Financial Plan
Without Paying For

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An Advisor

Be your own financial adviser. If we took the time to improve our financial literacy, we'd all be a lot better off, says Emma Simon. Be informed: following your own finances can be very worthwhile.

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Be Your Own
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shows you how to
make sensible
financial decisions
without the need for
expensive advice.
Its accessible style,
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