Second Opinion Support

Has your investment strategy been designed to adapt over time to changes in your life?

Every person should be comfortable with their financial strategy. Does your current asset allocation fit each of your goals and multiple risk tolerance levels?

Legal documents and life insurance should be aligned with your investment strategy to meet your goals. Are you set up to provide for your heirs the way you want to?

Planning should involve both the accumulation and distribution phases of your financial life. Does your current plan account for both long term income and tax efficiency?

Whether the result is a confirmation you are on the right path or a recommendation that some adjustments may be in order, receiving a second opinion can help you gain confidence in your long term financial plan.

It is simply not possible to get a reliable second opinion from the same person who gave you the first one.

There are three possible outcomes from using our Second Opinion Service:

1. Your plan is doing what it should and you are on the right track. We wish you well and hope you leave our office with a little bit more confidence.

2. Minor changes may be in order and your current advisors/agents are the right fit to make those adjustments for you. We'll compile our recommendations and provide them to you to take back to your current team.

3. Major adjustments are necessary and we could be the right team to help you get back on track. We will fully explain our findings and how we determined them, fill you in on the Chestnut Investment Advisory investment and client service philosophies, and see if you agree that we are a fit for each other.

Shouldn't you know if you're on the right track? Contact us today and set up your Second Opinion Service meeting. The only thing it costs is time and the results could be invaluable.

What to learn more? See that link on the front page, click it and get an appointment via the phone or some other media step. Again let Chestnut Investment Advisory hold your hand.

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