

Do You Have the Tools to Carry Out Your Investment Plan?

I regularly meet investors who are going it alone. They are overwhelmed with choices and have little or no investment planning experience. Back in December of 1986, I told investors that they need a game plan and the tools to carry it out. I wrote:

“‘It was an overcast day.’...Everything on the beach came to a halt...When he passed out 40 Redsand volleyballs,...’it looked like it had rained radioactive bowling balls.’”

These graphic quotes from Bruce Anderson’s recent “Shoptalk” column in Sports Illustrated describe the beach scene at Manhattan Beach, California when Olympic volleyball star Steve Timmons’ newly designed, shocking yellow volleyballs were passed out.

It was a great article on Steve and his new sports product. Steve Timmons has become somewhat of a Southern California volleyball legend. With his Grace Jones-style red flattop and standing 6’5”, Steve, like his shocking yellow volleyballs, is hard to miss.

I was initially drawn to the Timmons article because I am a long-term volleyball fan and had just recently spent time watching professional volleyball at Laguna Beach. The Sports Illustrated article described the U.S. Olympic team MVP and gold medalist as a “terminal” player, the type of player who is so dominant that “when he hits or blocks a ball, the point is usually over.”

A “terminal” player—strong words with meaning going beyond the world-class player volleyball circuit. The word terminal has a finality to it that few words possess. We would all like to

view ourselves as having the ability to drive home the terminal point. One place that such a skill would be most beneficial is in the financial markets, a place where everyone wants to be a winner. But to possess the skill of the “terminal” player takes more than desire.

You need a game plan and the tools to carry it out.

My family-run investment counsel firm can help you develop a game plan and carry it out. If you would like to be contacted by a seasoned advisor who can help you set and achieve your investing goals, please fill out the form below.