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The Strategic Advisor

Strategies for Success **July 2009**

CLARITY: The process of "thinking clearly about the problem," transforming an opaque thought into a crystal clear vision.

CONFIDENCE: The process of "thinking clearly about the solution." Identifying the strategies to be applied to the planning gaps that bring forth the crystal clear vision.

COMFORT: A crystal clear vision coupled with success strategies brings a sense of comfort that we are on the path of achievement.

RESULT: PEACE OF MIND, FINANCIAL FREEDOM



[Changing Jobs? Take Your 401\(k\) and ... Roll It!](#)

If you've lost your job, or are changing jobs, you may be wondering what to do with your 401(k) plan account. It's important to understand your options.

[More Details](#)



[Refinancing Your Mortgage: Is It Worthwhile?](#)

Mortgage rates on 15- and 30-year fixed mortgages are at all-time lows. So, is now a good time to refinance your existing mortgage? That depends on several factors.

[More Details](#)



[Estate Planning Opportunities in a Down Market](#)

A down market can mean tough times, but it can also present unique opportunities to minimize property transfer (gift and estate) taxes.

[More Details](#)



[Ask the Experts: How can I diversify in a difficult market?](#)

For a while, it seemed as though there was no refuge from the stock market's problems. And yet heightened uncertainty underscores the importance of hedging your bets.

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[Ask the Experts: What are some alternatives to just waiting for a market bottom?](#)

Are you waiting to invest until you're positive the market has hit bottom? You may be increasing your odds of missing much of the upturn when it comes.

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