



COMPASS
PLANNING ASSOCIATES

Fee-Only Financial and Investment Planning

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On Course - Special Edition

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Hi, Everyone,

It's been a long time since we've seen market volatility like we have experienced recently.

I wanted to check in to remind you why asset allocation, periodic rebalancing, and managing to the time frame of your financial goals -- not market timing -- is so important.



Periods of market volatility during the bear market of 2007- 2009, after 9/11, and after the tech bubble are distant memories, but during those times it felt as though the markets would never recover. Yet, they did. You have a plan. Stick with the plan. Email us if you want to discuss.

While we hope the human effects of the coronavirus can be minimized, we don't yet know the full economic impact these times will have on the markets. In the meantime, it's important to remember the lessons of the past.

Thanks.

Jennifer Lane, CFP



Compass Planning Associates helps families, individuals, and small-business clients achieve financial security, knowledge, and control over their money. Our **fee-only, client-centered approach** provides education and guidance for achieving financial goals and dreams.

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