ANDERSON
WEALTH MANAGEMENT GROUP
of Wells Fargo Advisors

Habits that help women investors succeed

Intuition. Patience. Discipline. A desire to learn. These are traits many women naturally possess and that can lead to confident decision-making and courageous accomplishments.

They're also the foundation that can help build a sound investing strategy. Perhaps you bootstrapped your own business, broke through the glass ceiling, managed the home front, or benefited from an inheritance. However you got to this point, your collective experience provides the wisdom to help you boldly move forward. But that doesn't mean doing it alone.

Working with a financial advisor who complements your investing style and listens more than talks, can help you continue making those confident decisions and keep your investment plan on track.

Holistic wealth planning that helps prepare you for the unexpected

When highly emotional life events happen, like divorce, death of a spouse, or even an inheritance, it can be challenging to factor in the financial implications. If one (or more) of these scenarios becomes your reality, it can be a huge relief to have your team already in place. An experienced financial advisor can help you navigate difficult decisions that could have an impact on you and your family for years to come.

Just in case, it's best to be prepared and proactive:

- Be aware of your family's assets, debts, retirement accounts, insurance policies, and other financial information.
- Gather important financial documents and safety deposit box keys and keep them accessible.
- Make sure you and your spouse or partner have up-to-date wills and trusts, and that you discuss potential tax implications with your CPA and financial team.

The right fit can make all the difference

Life hums along and then…something changes. Perhaps you initiated the change or maybe you had to react to it. Either way, having resources to help you navigate decision-making can help mean smoother sailing.

Considering all the aspects of life that have a financial implication is like a wave that keeps expanding.
From investing for a home, college costs, or retirement, to exploring lending and insurance options, an experienced financial advisor can help you manage risk while keeping you on track toward your investment goals.

As always, if you have any questions on this topic or any others, feel free to contact any of us at any time.

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