



Story from **Leviathan Financial Advisor**

What does a financial advisor do?

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Leviathan Financial Advisor

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Financial advisors can give you a game plan that puts you on track to achieve your financial goals.
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At some point, you've probably come across information about a financial advisor. Somebody in your company may have suggested investing in one, or you've seen success as a product of their efforts. But what do they do? A lot, actually. We'll break down the specific jobs of financial advisors and how they can benefit you. When it's time to start taking your investments seriously, call Leviathan Financial Advisors. We'll schedule a personalized, one-on-one consultation and form a plan of attack. Every client is unique in their needs, and we adapt our work to meet those requirements.

Quick Facts

If you take away anything from this article, it should be that a financial advisor's job to construct your personalized financial plan to meet your goals. We're not just about executing trades or pushing pencils. This plan takes into account your portfolio and aspirations, including savings, insurance, tax strategies, and overall budget. We regularly check in with you to re-evaluate situations and make sure you're always on track to hit your goal. We'll cover the amount of money you should be saving, types of accounts you will need, and the type of insurance you should have set up. The first aspect we'll cover during your consultation is figuring out where you stand today.

Your Financial Health Situation

It's impossible to plan for your future without knowing where you're currently standing. We'll ask you to complete a detailed questionnaire to help us understand your current situation and get everyone on the same page. This helps us as much as it helps you. We'll use this questionnaire to have a mutual understanding of your liabilities, expenses, assets, income, and aspirations. Basically, you list all of your current investments and sources of income. After we understand each other, we'll start building your financial plan.

Calculated Plan of Attack

After completing the research phase, we take in all this information to form a comprehensive plan. This will then function as your roadmap to success. We'll start with an in-depth summary of your current situation, including your net worth and all of your assets and liabilities. We'll also cover a vast number of topics, including estate planning, long-term care, risk tolerance, and other important issues. Our goal here is to help you understand your situation as well as we do. Based on this information, we then create a plan showing you the best-case scenario as well as less fortunate ones. In order to understand the worst case scenarios, we provide you with steps on how to avoid them. You're free to review your plan and ask questions and voice concerns, as you should. After all, it is your assets.

Long-Term Financial Monitoring

Our job doesn't end when we suggest what you should do with your investments – rather, we enjoy being with you every step of the way, creating a trusting and professional relationship. We'll provide routine statements updating you on how your portfolio is performing. If you're considering making a significant change in your life that can impact your finances, we'll be there for you. These instances can include marriage, divorce, starting a family, buying or selling your home, changing jobs, and altering your career.

Do I Need a Financial Advisor?

You don't need to have a mansion in the Hamptons to make use of a financial advisor. Anyone at any stage of their life can benefit from working with one. The important part is finding an advisor that works with your situation. If you're feeling overwhelmed, confused, or nervous about your financial situation, there's nothing wrong with asking for help. If you're not sure how to invest your savings, are consistently losing money through your investments, don't have an estate plan, or just need help getting your ducks in order, give Leviathan Financial Advisors a call. We take the stress out of money management, allowing you to see your situation clearly. Schedule your consultation with us today.

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