



INVESTMENT QUORUM

UNIQUE, BOUTIQUE WEALTH MANAGEMENT

Investment Quorum
Guildhall House, 85 Gresham Street
London
EC2V 7NQ

Tel: 0207 337 1390
Web: www.investmentquorum.com

Market fluctuations

Investments that best align with your financial goals

Without a plan, investors are prone to making knee-jerk reactions when there are swings in the market. A well-thought-out investment strategy provides the guidance needed to help you stay on track when inevitable market fluctuation occurs. It can also point you towards the types of investments that best align with your financial goals.

By maintaining a clear purpose for your investment strategy, you help yourself stay on track and confidently navigate the ups and downs of the market.

When developing your investment strategy, consider the following factors:

1. YOUR INVESTMENT GOALS

Specifically, for what or whom are you accumulating funds? Your investment goals will help you determine suitable investments.

2. YOUR TIME HORIZON

How many years will it be until you need to use what you have invested? Longer time horizons

may provide flexibility for more aggressive investment choices.

3. YOUR TOLERANCE FOR RISK

Take your broader financial situation into account, and consider how comfortable you are with varying degrees of risk as you pursue your investment goals. ■

INFORMATION IS BASED ON OUR CURRENT UNDERSTANDING OF TAXATION LEGISLATION AND REGULATIONS. ANY LEVELS AND BASES OF, AND RELIEFS FROM, TAXATION ARE SUBJECT TO CHANGE. TAX TREATMENT IS BASED ON INDIVIDUAL CIRCUMSTANCES AND MAY

BE SUBJECT TO CHANGE IN THE FUTURE. ALTHOUGH ENDEAVOURS HAVE BEEN MADE TO PROVIDE ACCURATE AND TIMELY INFORMATION, WE CANNOT GUARANTEE THAT SUCH INFORMATION IS ACCURATE AS OF THE DATE IT IS RECEIVED OR THAT IT WILL CONTINUE TO BE ACCURATE IN THE FUTURE. NO INDIVIDUAL OR COMPANY SHOULD ACT UPON SUCH INFORMATION WITHOUT RECEIVING APPROPRIATE PROFESSIONAL ADVICE AFTER A THOROUGH REVIEW OF THEIR PARTICULAR SITUATION. WE CANNOT ACCEPT RESPONSIBILITY FOR ANY LOSS AS A RESULT OF ACTS OR OMISSIONS.

