



It's great to be coach.

When things go well of course!

In my situation as a financial advisor, I see that my clients are the owners and my job is to put the best team out on the field. The goal is gain as much ground as possible with the goal of getting my client's portfolios over the goal line.

Simple right?

Not so fast.

The implications of Covid have certainly made managing investments a serious challenge. Sort of like being backed up on your own 1-yard line and its 3rd down with 25 yards to go for a 1st down. Not great odds.

But much like sports, sometimes the unexpected happens. In the case of the markets we are witnessing quite a rally off the March lows from seemingly the edge of the abyss.

Much like a football coach you have options. You assess the situation and look to put the right players out on the field and run the highest percentage plays you hope will work.

Investment Management can be quite similar.

I have investments, such as stocks, bonds, commodities, cash, and many other assets that operate in different ways depending on the conditions.

Some assets classes can be more defensive while other assets may naturally be more offensive and may have the ability to appreciate.

The key is to know when and how to use these different assets. And sometimes the "game" situation evolves and changes. The better coaches know how to adjust. They typically know what works and if it's not working they make those changes.

How well is your "team" doing? What "plays" is your coach running? Which "players" are on the field for you? Should they be there?

And most importantly....Do you know if you're portfolio is on "offense" or "defense"?

Having your “defense” playing offense generally doesn’t provide for good results.

Take care,

Jim Gibbons

If you’d like to know if your portfolio is on “offense” or “defense” we accept appointments!

The best way to determine a good fit is to start with talking. No statements or lengthy presentations just start with a chat and we’ll see where it goes. Remember, we want to know you before we accept your business.... [Reserve your Time Slot!](#)

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