

Marietta Estate Planning Lawyer Asks: “What Are Your New Year’s Resolutions For Your Portfolio?”

We all make New Year’s resolutions...

Losing weight...

Spending more time with family...

Learning a new language...

Few of us think of our investment portfolio in terms of resolutions. But we should.

This is a great time to sit down and really look at how your investments have done this year and plan for the next. If you’re a do-it-yourself investor, with all the market volatility this would be a great time to talk to a financial and legal advisor.

Even if you have professional help, you need to educate yourself about your investments to understand what you don’t know. There are a lot of investment opportunities available. One of the most popular investment vehicles is the mutual fund.

Here are a few places to look for information on the mutual funds available:

1. [Morningstar](#)

This is one of the best known research firms for individual investors. They provide research reports, portfolio trackers and lots of articles on their website. Much of the information they provide is free. However, some do require a subscription fee. In addition to mutual funds, Morningstar also researches stocks, 529 plans, and hedge funds.

2. [Lipper](#)

This site has information available for individuals and professional investors. They rate mutual funds against each other. Their ratings are based on total return, consistent return, preservation, expense, and tax efficiency.

3. [Kiplinger’s Fund Finder](#)

This site allows you to select the criteria you want to review for various funds. You choose the features you want in your mutual fund and Kiplinger’s Fund Finder will provide you with a list of funds that meet those criteria.

4. [Cake Financial](#)

Cake Financial provides free and for fee tools to help you research mutual funds and track the ones you've chosen. They have information available on over 18,000 funds in more than 60 categories.

5. [FundAlarm](#)

This is a free site that provides information to help you decide if or when it's time to sell a mutual fund.

Take a look at your portfolio and then go to several of these sites to review the conventional wisdom and statistics on the funds you're invested in. Once you do your homework (and have educated yourself on what you need to know), you'll be much better equipped to get what you're paying for when you meet with a financial advisor.

Still not sure about what you need to know to protect your family's future and your investments?

Call us at 770-425-6060 to schedule your Georgia Family Treasures Planning Session today. As part of our Georgia Family Treasures Planning Session, we will sit down with you, assess where you are now and where you need to be. Our Georgia Family Treasures Planning Session is normally \$750, but this month I've made space for the next two people who mention this article ("Resolutions") to have a complete planning session with me at no charge. Call today and mention this article.