

FINANCIAL FRIDAYS nymeo Federal Credit Union

Should You Work With A Financial Advisor



It's almost 2022, and most of us have plans to improve something. Maybe it is getting a retirement plan together or organizing your finances. Should you consider working with a financial advisor? Read below and find out.



What is a financial advisor?

Financial advisors are the experts in the field, and their job is to help you reach your financial goals. They provide recommendations for a diversified portfolio that can help you make progress toward your goals and protect against the unexpected. Their expert guidance helps you stay on track and overcome obstacles.



What advice will I get?

It varies. Some people are looking for big-picture advice involving many aspects of their overall financial picture. Others only seek advice in a specific area of their finances or goals.



What's the benefit of an ongoing relationship with a financial advisor?

Just like your doctor, your financial advisor will get to know you and your financial picture. A relationship with a financial advisor can help you prepare for and navigate unforeseen events as they arise. They help you pursue financial goals but can also assist you during unplanned events like a job loss, market uncertainty, or health issues that can take a toll on your finances.



How can they help navigate market difficulties?

Your advisor aligns your investment recommendations with your financial goals, risk tolerance and time horizon, factoring in market movement up and down over time. As market conditions change, your advisor can help you review your goals and portfolio and adjust if necessary.

Interested in getting expert advice?

As a Nymeo member, you have access to two trusted financial advisors - Anna Behnam and Irene Tata. Take advantage of this member benefit in the new year! Schedule a time to chat at your convenience today.

**Schedule a Complimentary Consultation with Anna
& Irene**



Anna A. Behnam
Financial Advisor



Irene Tata
Financial Advisor

How much does a financial advisor cost?

Your initial meeting with Anna or Irene is complimentary! Depending on your specific need, as well as the complexity of your situation, you may choose to pay for additional options. [Schedule a time to speak with them at your convenience.](#)

Investment products are not federally or NCUA-insured, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

The initial consultation provides an overview of financial planning concepts. You will not receive written analysis and/or recommendations.



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