

ESSENTIALS OF A SUCCESSFUL INVESTMENT STRATEGY

Presenter

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INTEGRATED FINANCIAL PLANNING

In our two-day seminar, we attempt to explore the most basic elements of a successful investment strategy by answering the following questions:

- Where are you today (financially speaking)?
- Where do you want to be on your retirement date?
- How do you get there?
- How to manage your money and protect your financial future?
- What kind of financial advisor you should select, if any?
- How to consolidate and streamline your investment portfolio?
- How to divide your investments among major asset classes?
- How to make sure your investment portfolio is well-diversified?
- How to avoid the tyranny of compounding by significantly reduce your investing cost?
- How to deal with financial atrocity?
- How to locate your investment assets to minimize your taxes?
- How to avoid outliving your money?
- What's better for you: active or passive investing?
- How often should you re-balance your portfolio?

Dr. Issa received his Ph.D in finance from the University of Illinois in 1967. He served as a faculty member in the Finance Dept. of the WMU Business School from 1976-2002, retiring as a Professor. Since 1986 he has been President and owner of Integrated Financial Planning, which provides financial advice and investing services to a diversity of individual and institutional clients. Dr. Issa served on the negotiating team and provided financial advice to the WMU AAUP during some of the most difficult contract negotiations. He also provided retirement financial seminars at no cost for WMU faculty.