



## What All Investors Need to Know About Their Investment Accounts...

...and where to find it all very easily

One of the greatest resources investors can use to help them manage their money the right way comes in the mail (or email) every month. It's their monthly statement. If they don't do anything else, they should at least follow the statement monthly. Some people who have more active accounts should look more frequently. Here are the first things to look at on the statement:

On the FIRST page of the statement...

- \* Compare last month's value to this month's
- \* Note any dividend or interest income
- \* Review asset allocation
- \* Look at cash flow, including check writing, debit card use, fees, and deposits

Dig a little DEEPER...

- \* Year-to-date income vs. outflow
- \* Specific investment performance
- \* Comparative yields

Video: Who Watches My Account? [Profile-Financial.com/my-account](https://Profile-Financial.com/my-account)

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- learn investment strategies from the world's best investors,
- improve your retirement plan, and
- build healthy financial habits.



Every show includes a discussion with an expert on how to invest for success. Host Douglas Goldstein, CFP® uses his 25 years of experience as a financial advisor to make money concepts simple to understand. Practical lessons give you tools and tips so you can make real changes. Contact Doug at [Doug@Profile-Financial.com](mailto:Doug@Profile-Financial.com) or call +972-2-624-2788.

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