

# DO YOU NEED A SECOND OPINION?

*When it comes to things that are truly important, second opinions are not just valuable; they can be priceless.*



PRIVATE WEALTH · TAX PLANNING · ASSET PROTECTION

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**I**t's not uncommon for someone to build their portfolio or create a financial plan and let it gather dust over the years. The problem with this set-and-forget method is that you may not be taking advantage of the latest opportunities that align with your needs and objectives.

As we progress through life, financial markets fluctuate, our personal priorities may shift and, as a result, our goals may change. It's critical for your portfolio or financial strategy to match these changes, otherwise you and your family may not be on the right path to achieve your objectives. At Hutchinson Family Offices, we believe it's important to not only regularly review your portfolio and strategy, but to also get a second opinion.

When should you consider getting a second opinion?

- If you don't feel like you are on the same page as your current financial advisor.
- If you or your current advisor hasn't reviewed or updated your portfolio or financial plan in the past three years.
- If you or your family has experienced a change in your financial situation, whether it's a new job, new child, new home, or other occurrence.

- If you are transitioning into a new phase in life, such as retirement.
- If you aren't sure your strategy or portfolio is up-to-date.
- If you feel that your portfolio may be too risky or not taking enough risk.
- If you are uncomfortable or unsure of the fees you are paying.
- If you feel there is an opportunity for improvement in your portfolio or strategy.
- If you have any concerns or questions about your portfolio or strategy.

*A second opinion offers you and your family a number of benefits, including the opportunity to:*

- Determine whether or not your portfolio or strategy is appropriately designed to help you pursue your goals.
- Ask questions.
- Receive answers to questions you may not have considered asking.
- Make necessary changes to your portfolio or strategies.
- Comprehensively evaluate your entire financial situation, portfolio, and strategies.
- Get perspective on your portfolio or strategy from a new angle.
- Ensure your portfolio and strategies are in line with your risk tolerance and time horizon.



*“By receiving a second opinion, we believe you may feel more confident in your strategy and receive insight into alternative approaches of which you may not otherwise have been aware.”*

At Hutchinson Family Offices, we utilize a thorough and holistic second opinion process. During our first meeting with you, we evaluate your family’s strategies and portfolios, as well as your goals, to determine whether or not you are on track. The goal of this meeting is to help you and your family understand where you currently stand and whether or not you should make adjustments to your plan.

After this first meeting, you or your family are in no way obligated to continue working with us. If you are satisfied with your portfolio and strategies, you can leave our office feeling confident. If you’d like to work with us to make changes and improve your plan, we use this second opinion process as a framework for implementation moving forward.

We offer second opinions for one reason: to help you and your family feel more confident with your strategies and make informed financial decisions. Through our second opinion process, you can expect to receive independent and objective advice, and a comprehensive analysis and evaluation of your portfolio, strategies, goals, and financial situation.

Find out if you are on the right track with your portfolio and strategies by contacting us for a second opinion.





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We cannot guarantee future financial results.

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