

FGAM Update January 2025

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Insights and information from Dr. William R. Nelson, PhD, Chief Investment Officer of Financial Gravity

In this update, Dr. Nelson will provide a reminder that the investment philosophy that guides our portfolio strategy is grounded in the long-term behavior of the stock and bond market and observations of common mistakes investors make.

Dr. Nelson will review a very practical example of what can go wrong when investors and money managers try to control uncontrollable things like recessions and interest rates. While there has been some correlation between inverted yield curves and recessions, it's far from absolute. Investors who acted on economists' forecasts of recession in the recent past may have needlessly incurred tax bills while missing an up market.

Many investors are concerned about the new administration's economic and regulatory policies, fearing that executive actions could adversely affect stock prices. Dr. Nelson will take a look at Trump's first term to suggest that the sky is most not likely going to fall.

Investors who own mutual funds will want to hear Dr. Nelson's analysis of mutual funds' inherent problems, which include inflated returns, high costs, and tax inefficiencies. We're sure you'll learn something new, and perhaps gain a greater appreciation of why ETFs can be a cheaper, more transparent and successful way to access stock market returns.

Watch the video here: <https://financialgravityfamilyofficeservices.com/fgam-update-january-2025/>

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