

FGAM Update October 2024

05/28/2025 12:25 pm CDT

FGAM Update October 2024

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

Dr. William R Nelson, FGAM's Chief Investment Officer, will open this update with a review of our investment management philosophy, which accepts that no one can reliably predict the future. Still, asset managers have a duty to focus on costs, tax efficiency, diversification and risk alignment. He will then review current concerns, which include two major wars and an upcoming election. While we simply cannot predict the effects of conflict on market returns, we can conclude that no significant correlation exists between the party holding the White House and the performance of stocks. Dr Nelson will explain that there is virtually always something to worry about but that investors are rewarded for taking risks. The topic of asset location on portfolio performance is reviewed, followed by examining why holding top-performing stocks can be so hard.

Watch the video here: <https://financialgravityfamilyofficeservices.com/fgam-update-october-2024/>

Investment Advisory Services may be offered through Financial Gravity Asset Management, Inc. (FG Asset Management), an SEC Registered Investment Adviser. FG Asset Management does not provide tax or legal advice and is not a certified public accountant. The material covered contains an assessment of the market and economic environment at a specific point in time and is not intended to be a forecast of future events, or a guarantee of future results. Actual results, performance, or achievements may differ materially from those expressed or implied. Information is based on data gathered from what we believe are reliable sources.

Investment Advisory Services may be offered through Financial Gravity Asset Management, Inc. (FG Asset Management), an SEC Registered Investment Adviser and/or Financial Gravity Family Office Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.