

FGAM Update April 2025

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

In this quarterly update, Dr. Nelson will provide some timely advice to investors who are or have been concerned about recent stock market volatility. The overarching theme is about the potentially negative impact of allowing natural human emotions to impact your financial well-being.

Dr. Nelson will begin with some remarks about the nature of successful investing, which, above all else, demands patience and discipline. Investors who focus on controllable things like costs, diversification, taxes and risk exposure have been well rewarded over the years, while others who have tried to predict the future have tended to underperform.

Dr. Nelson will examine how the human condition, developed as a survival mechanism over the millennia, is a positive thing for the success of our species, but is maladapted for investing. Tribalism and confirmation bias have led to social cohesion and societal success, but have also led to the herding behavior that makes success in investing so difficult.

A review of Time Optimized Planning is also provided. This short tutorial on our practical allocation and rebalancing method will show how retirees can maintain their lifestyle in retirement despite the many threats, like inflation and market downturns, that can threaten financial security.

The presentation will conclude with some valuable pieces of advice for prospering no matter which political party is in power.

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

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