



About

Wealth Management

Approach

Media

Contact 

MAKE YOUR INVESTMENTS GREAT AGAIN

Finances
Nobleman

Mar
20
2017



About

Wealth Management

Approach

Media

Contact 



(Reprinted from the Nobleman Magazine – Premier Edition – Written by Bart Zandbergen)

 (949) 668-0771

 (949) 668-0771



addition to ushering in 2017, we are also welcoming a new President into the White House to lead our nation.

While rising interest rates are eminent and a 7 year bull stock market run are both cause for concern, the President has made promises that could strengthen our economy, thereby maintaining the stock market run for a bit longer than anticipated.

Throughout this season of change, the key to positioning oneself for the ebb and flow is to diversify and include alternative investments such as non-stock, non-bond assets. While it's impossible to know what the future will hold, implementing a forward thinking strategy that works towards your individual goals will pay off in dividends.

5 Wealth Building Recommendations

Having been a CFP for 25 years, I am often asked what my top tips are for making smart investments. Here are my top 5 recommendations that everyone should consider when making strategic decisions to their wealth building strategy:

1. Avoid Self Destructive Investor Behavior. Be an Investor...not a Trader. From 1994 to 2013, the average stock fund returned 8.7% per year while the average stock investor earned only 5%. We call the gap between these results "investor behavior penalty". Driven by emotions like fear and greed, they succumbed to negative behavior such as: 1) Pouring money into the latest top performing fund or asset class expecting the winning streak to continue 2) Avoiding areas of the market that have performed poorly, assuming recovery will never return 3) Abandoning their investment plan by attempting to successfully time moves in and out of the market, a near impossible feat.
2. Keep long term goals and objectives in mind while refusing to be swayed by emotions or "Hot Tips".
3. Diversify. There is something to the old adage "do not keep all of your eggs in one basket".



About

Wealth Management

Approach

Media

Contact

Reinsurance, Life Settlements, Managed Futures.

- 5. Pay attention to your Bond holdings. Rising interest rates could have negative effect on the value of exiting bonds. There is no time like the present to take inventory of what works, what doesn't and what can be improved upon.

Categories: [Finances, Nobleman](#) By [Bart Zandbergen](#) [March 20, 2017](#) [Leave a comment](#)



Author: Bart Zandbergen

My Mission Statement: To provide my clients financial peace of mind, allowing you time to focus on creating true wealth for a purposeful life. I strive to help you realize your financial goals through integrity, commitment, and genuine caring for your well-being.

PREVIOUS

9 Wines to Try This Spring

NEXT

25 Years in Review: The Evolution of My Investing Philosophy

Related Posts

Investment Advice

Immediate Actions

(949) 668-0771

(949) 668-0771



About

Wealth Management

Approach

Media

Contact 

February 8, 2021

The Divorce Team
You Need to Protect
Your High Net
Worth
January 4, 2021

How to be fiscally
responsible during
times of uncertainty
September 15, 2020

The Insurance
Policies Every High
Net Worth
Individual Should
Consider
February 13, 2020

How to Make Sure
Your Wealth Lasts
for Multiple
Generations
December 13, 2019



About

Wealth Management

Approach

Media

Contact 

Contact Bart



(949) 668-0771



bart@zandbergengroup.com



Mon-Thur: 8:00 AM - 5:00 PM PST



Fri: 8:00 AM - 3:00 PM PST



32322 South Coast Highway
Laguna Beach, CA 92651



Join Our Newsletter

Get the latest financial and lifestyle tips from
Bart

NAME:

EMAIL:

Sign Up



(949) 668-0771



(949) 668-0771



About

Wealth Management

Approach

Media

Contact 

Group is a DBA of Access Wealth Management, LLC a Registered Investment Advisor with the SEC. Bart A. Zandbergen, CA Insurance License #OA96242.

 **Broker Check**