

Why Should I use Blue Elm?



- Planning is essential to reaching any objective, why would finances be any different? Planning will make you ask the tough questions and prioritize what is important to you. Once your goals have been identified we can figure out how we can best reach them.
- A great point that was made to me was that you can't go back in time and take a vacation even though it was within your financial means. We hope to prevent both potential financial extremes, being too conservative and not living life to the fullest or not properly planning and running out of money.
- Compound interest makes a massive difference! Are you really going to take the time to keep your portfolio properly managed or will it become an afterthought? I encourage everyone to look at a compound interest calculator online and see just how big a difference a few percentage points make over time.
- We provide access to complex rebalancing software and tax harvesting strategies that can help make that small but significant difference over time. Rebalancing software not only helps to keep your risk tolerance consistent but forces you to buy assets when they are low and sell when they are high.
- Working with us provides a one-of-a-kind educational opportunity of learning from professionals that facilitate your ability to grow an understanding of mastering your own finances. We have connections to groups of experts which can give you the best insights from each specialization.
- Markets make us emotional, especially during volatile times. Having a trusted and experienced advisor to consult and a proper risk tolerance can help prevent irrational decisions.
- Working with us will inherently encourage you to give back to your community through donations and introduce you to groups of people you enjoy being around!