

**Link to video:** <https://youtu.be/8-7XUg1mEYU>

**Link to handout:** <https://www.aaii.com/files/images/20201028-WealthBuildingPreferences.pdf>

### **AII Articles**

[A Process for Creating Your Own Investing Plan](#)

[Resources for Checking Out an Adviser or Broker](#)

[You May Need a Different Kind of Financial Professional for Retirement](#)

[Advice on Evaluating an Adviser From an Industry Veteran](#)

[How to Check Out a Financial Advisor](#)

[A Worksheet Approach to Selecting a Financial Planner](#)

[Coronavirus Returns for Robo-Advisers Expose Differences](#)

[Investors Unaware of Cognitive Decline Are Likelier to Lose Wealth](#)

[Biology and Life Experiences Influence Investing Style](#)

[How to Buy Individual Bonds: A Fixed-Income Toolkit](#)

[ESG Equity ETFs](#)

[ESG Equity Mutual Funds](#)

[Keeping Transactions Clean From the Wash-Sale Rules](#)

[Understanding Mutual Fund Fees and Expenses](#)

### **AII Resources**

[Learn & Plan](#) area of AII.com for all Wealth-Building articles and worksheets

[Wealth-Building \(AII Way\) Archive](#)

[Buffett Hagstrom Screen](#)

[My Portfolio](#)

[AII Stock Screens](#)

[Model Shadow Stock Portfolio](#)

[Mutual Fund Guide](#)

[ETF Guide](#)

[A+ Investor](#)

[AII Dividend Investing](#)

[Stock Superstars Report](#)

[VMQ Stocks](#)

### **Other Resources Mentioned**

[Finances in the Older Patient With Cognitive Impairment](#) study by Eric Widera et al

[CFP Board: Find a Planner](#)

[National Association of Personal Financial Planners](#)

[“The Essential Buffett,”](#) by Robert G. Hagstrom

[EMMA Muni Bond Database](#)