

Link to video: https://youtu.be/0Tw_Tx4iinQ

Performance Returns Segment

[There's More to Portfolio Returns Than Just the Numbers](#), by Paul Merriman

[AAll Articles by Paul Merriman](#)

[Tap Into Tax-Related Information on Stocks and Funds](#)

[Achieving Greater Long-Term Wealth Through Index Funds](#)

[Getting a Start With Dollar-Cost Averaging](#)

[How Much Risk Can You Handle and Still Meet Your Goals?](#)

<https://paulmerriman.com>

<https://twitter.com/SavvyInvestorPM>

Socially Responsible Funds

[Socially Responsible Mutual Funds](#)

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[Which Funds Fit Your Needs? Here's How to Decide](#)

[The Building Blocks of a Successful Portfolio Allocation](#)

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[Guide to the Top Mutual Funds](#)

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[My Portfolio](#)

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Lessons From Investment Pros

[Lessons From How Professionals Invest Their Money](#), by Brian Portnoy

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[Why Your Goals Should Drive Your Investment Decisions](#)

[The Sound of Silence: Speaking to the Heart of Money Management](#)

[How Human Behavior Differs From Traditional Economic Models](#)

[Five Major Considerations for Early Retirement](#)

<https://shapingwealth.com>

<https://twitter.com/brianportnoy>

Mailbag: Choosing a Financial Planner

October 2020 Wealth-Building Process article:

[Determining Your Portfolio Management Preferences](#)

More in-depth discussion in May 2021:

[8 Factors That Influence Your Investing Management Preferences](#)

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

[Why Your Financial Adviser Should Be a Fiduciary](#)

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

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

[Wealth-Building Process at Learn and Plan area](#)