

Link to video: <https://youtu.be/T--4eRu-Z-U>

Link to handout: <https://www.aaii.com/files/images/20210616-PRISM-WBP.pdf>

PRISM Wealth-Building Articles

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

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

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

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

[Populating Your Portfolio Based on Your Allocation and Preferences](#)—June

AAll Journal Articles

[Stock Market Retreats and Recoveries](#)

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

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

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

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

[The Sell Decision With Mutual Funds: Knowing When to Walk Away](#)

[Using Sell Signals to Improve Results](#)

[When to Sell Stocks to Cut Your Losses](#)

[Model Shadow Stock Portfolio Articles](#)

AAll Resources

[PRISM Wealth-Building Process](#) with worksheets

[Risk Assessment Worksheet](#)

[What Type of Investor Are You? Worksheet](#)

[“Investing at Level3,”](#) by James Cloonan

[AAll Asset Allocation Models](#)

[AAll Model Portfolios](#)

[AAll Stock Screens](#)

Other Resources Mentioned

[SEC Check on Advisers](#)

[NAPFA Find an Adviser](#)

[FINRA BrokerCheck](#)