Am I OK?

QPW Perspectives – March 2020

As the COVID-19 pandemic continues to run its course, many people are seeking certainty in a world of seemingly increasing uncertainty. Each of us is concerned about the health impact on ourselves, our families and the broader community. Many feel unease about our jobs, our investments, our businesses and the economies in Canada and around the world. We are hungry for advice and information without really knowing how to decide if the information or advice we receive is good or bad. In a nutshell we want to know “Am I OK?”.

History shows that time and again, capital markets dislike uncertainty more than anything, even more than bad news. At times of great uncertainty, investor confidence can be shaken and trading volumes (i.e. liquidity) can dry up. As it relates to the capital markets, we cannot be certain what will happen in the short term. That said there are two vital points to keep in mind:

1. The uncertainty and decline in the capital markets is event-driven. While the recovery may prove to be slow and gradual, the COVID-19 pandemic will end. In the meantime, it is important to maintain the discipline to avoid emotional decisions about your investment portfolio.

2. Each Quadrant client has a purpose built portfolio that takes into consideration their individual long-term financial and life-style objectives. This does not come with the expectation that the portfolio will never experience declines; rather your investment portfolio is built to withstand them so that it can carry through to the next recovery and future gains.

In times of crisis, the knowledge that your portfolio is well positioned to weather the storm and allow you to take advantage of future market gains, does not help with today’s question; “Am I OK?”.

To answer this question from a financial perspective, formal wealth planning must be integrated with any portfolio design – a fundamental aspect of Quadrant’s service to our clients. Quadrant’s team of professionals is working diligently and deliberately in updating all of our client’s formal wealth plans in order to prescriptively answer your question “Am I OK?”.

Quadrant continues to take all necessary steps to safeguard the health of our employees and their families while providing for continuity of service to our clients. (**COVID-19 - Quadrant Readiness**). We are continuing to meet with clients and prospective clients by telephone or video conference to review portfolios and individual wealth plans. We stand ready and available to assist you in any way possible during this challenging time.

About Us

Disciplined. Compassionate. Effective.

Quadrant Private Wealth is an independent, comprehensive, integrated wealth management firm committed to your financial well-being and peace of mind. We take the time to understand your complete financial picture. We tie all of your information together, including tax planning, to paint a picture of what your financial future could look like. And we aim to earn your complete confidence in the process.

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