**A brochure with a picture of a person

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**Email 3 Follow-up from Behavioral Portfolio® Webinar  
Subject:** New 36-pg. Investment Owner’s Manual  
**Send Date:** **Tuesday, July 1  
List** of everyone who registered/attended the webinar   
**Sender:**   
**Email preview pane:** The Investment Owner’s Manual: key forces that shape our thinking on the economy—and portfolios.   
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Hi Advisor first name,  
  
Fear and uncertainty can lead investors to make costly mistakes. That’s why I’m sending you our new Investment Owner's Manual. It’s your guide to what investors fear and what inspires confidence.   
 **Download Now:** [Link]   
  
**Here’s what it covers:**   
▪ **Beyond the Herd:** Overcome 7 big investing challenges  
▪ **Inflation & Rates Sting?** Hedge portfolios while fully participating in market surges  
▪ **Bubble Trouble?** Strategies to stabilize portfolios  
▪ **Zero Returns Got You Down?** One critical factor investors forget  
▪ **Potential Big Losses Looming?** Ease worries and defend against market downturns

**Let's Talk,** whether you’re managing individual clients or large model portfolios, we’ll help you:

* Stress test your allocations
* Build all-seasons portfolios
* Confidently communicate about risk to clients

Book a convenient time here. [Sales Calendly]  
  
Talk soon,

Sales signature

*P.S. In case you want to see it again!***Download The Behavioral Portfolio® slides** (PDF)  
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