

Rebalancing Checklist

Is It Time to Tune Up Your Portfolio?

Use this short checklist to check in on your portfolio:

- Has it been 6–12 months since your last rebalance?
- Are any of your asset classes more than 5–10% off target?
- Has your risk tolerance changed (due to job change, retirement, life event)?
- Have your financial goals or time horizon shifted?
- Have you added large contributions or withdrawals recently?

If you answered yes to any of these—it's probably time to rebalance.

Keep your investments aligned, your emotions in check, and your goals in focus.

Let's do a portfolio checkup together:

www.calendly.com/ashlinewcomb