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“Long vs Short-Term Goals” Video Transcript

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You have financial goals in life.

Some are long-term goals, like saving for retirement or paying for education.

Some are short-term, such as saving for a vacation or a down payment on a car.

But how do you reach your goals?

Depending on your timeline, your investment strategies can be tailored to help you meet your goals.

For short-term goals, you may want strategies that offer lower risk and easier access, like high-yield savings accounts, CDs, or money market accounts.

For longer-term goals, consider strategies with higher-growth potential investments over time - this might include stocks, bonds, mutual funds, or exchange-traded funds. These investments could be held in taxable or tax-advantaged accounts as appropriate.

For those goals that fall in between, consider using a mix of short-term and long-term strategies to help you reach your goal.

Planning is important. Once you’ve thought through your goals and timeline, don’t go it alone.

Connecting with a financial advisor is a great way to help align your strategy and your goals, on your schedule.

[Image on screen: Discover more at: wfa.com/financial-ed]

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