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A goals-based wealth management approach can help you balance your primary objective with your other priorities. For example, if you're saving to buy a home, you may still be able to put some money into your retirement accounts to take advantage of an employer match, and to prepare for the future so that when your next goal takes center stage, you'll have already begun to work toward it.

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Illustrating the implementation of a dynamic goals-based asset allocation process, the author explains that its key initial distinction is between internal and external assets, with a family dividing its assets into the two buckets to split those it will manage itself, such as a family business, from those assigned to external managers.

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