

Focus | Banking & Finance

QA

Burk Rosenthal Rosenthal Retirement Planning

Burk Rosenthal heads Rosenthal Retirement Planning LP, which has offices in Fort Worth, Dallas and Las Colinas. Rosenthal has a background in personal financial planning, but found his true business passion in retirement planning.

In light of all the current events on Wall Street and Capitol Hill, what should people do and not do about their retirement savings and investments?

In most cases, investments are part of a long-term strategy. Whether it's planning for retirement or for someone who's already retired and planning for income for hopefully for many, many years of retirement to come, or planning to put a child or grandchild

through college, they should stay focused on their long-term strategy as much as possible. Ignore short-term fluctuations in the market, what we're going through now. What they should not do is panic and make a decision that could be catastrophic to their long-term plans based on a short-term economic event.

What have you been hearing from your clients lately?

The biggest thing we've heard is, "Do I need to change my strategy?" or "Am I positioned correctly?" And, in some cases, no changes are recommended whatsoever, and it really depends on the client's goals and circumstances. But I know historically when we're in temporary down markets like we're in now, the worst mistake many have made is jumping out when it seems like the downturn is never going to end. In hindsight, often times those few who jump out shortly before the recovery happens then kick themselves for getting out near the bottom.

How did you get involved in retirement planning?



I was interested in it prior to even getting into this industry. For a while I found myself coming home from work and reading about retirement planning and investing. Really it was almost more of a hobby before it was a career.

What's the best retirement advice you've ever received?

Start as soon as you can, stick with it, stick to your long-term strategy and don't let short-term fluctuations in the market steer you from your long-term strategy or let you get off path.

Leslie Wimmer

*Securities and Advisory Services offered through National Planning Corporation (NPC), Member FINRA/SIPC, a Registered Investment Advisor.
Consulting Services offered through Rosenthal Retirement Planning, LP, a Registered Investment Advisor.
Rosenthal Retirement Planning, LP and NPC are separate and unrelated companies.*