

The Coronavirus And Your Money: What Are The Best Financial Advisors Doing Right Now?

Moenio shares unique perspective on what the best financial advisors have been doing since mid-February in three distinct areas you can use right now

MIAMI, FL, UNITED STATES, March 9, 2020 /EINPresswire.com/ -- Kevin M. Neal, Founder, and CEO of Moenio, LLC shares exclusive insights into how you should be evaluating the advice provided from your financial advisor, investment advisor, multi-family office or others with the devastating impact of the Coronavirus in his latest paper, "[The Coronavirus and Your Financial Advisor](#)."

With the ripple effect of the Coronavirus spreading from Wuhan, China to Seattle, Florida, New York and other areas around the world, what actions has your advisor taken the last four weeks, if any?

"We have been on the phone for four weeks talking with our clients and their investment advisors," said Kevin Neal. "The challenge for us, as a firm focused on making certain the financial advisors and bankers are working in our client's best interest, is that many of them are not prepared and worked on a mindset that this event is similar to bad employment numbers or a small revision to GDP. This is just not the case. The Coronavirus halted production in China and has impacted countries around the world. The potential revisions to all economic data are significant and will be meaningful."

“

The best advisors were doing research back in mid-February. In 20+ meetings with our clients while their advisors discussed their portfolios, the best had tangible recommendations based on facts."

Kevin Neal

[In the paper](#), "The Coronavirus and Your Financial Advisor," Mr. Neal shares his experiences during the past four weeks as he has met with some of the leading wealth management firms and advisors in the country while representing his clients; families who want insight and someone sitting on their side of the table acting as their advocate. The paper is focused on giving specific insight to individual families and charities that they can use to help gauge the quality of the advice.

"This was an exogenous event," said Kevin Neal, "but while the short-term markets and the impact of the coronavirus are unknown, there are specific areas financial advisors and firms can



address. In fact, we are using this period to evaluate the quality of advice and expertise provided to our clients by advisors, multi-family offices and others.”

As one of the only firms in the United States hired by families, charities, and trustees to provide insight and perspective on what the best financial advisors and firms are doing for their clients, now is a critical time to know that those you have entrusted with your wealth are managing your investments correctly.

[About Moenio, LLC](#)

Moenio is a client-advocacy firm headquartered in the Wynwood area of Miami, FL with a satellite office in Nashville, TN. Moenio provides Investment & Trust Protector Services through their proprietary evaluation and ranking system, CAAR, that helps their clients understand if they can trust those they have hired and if they are working with not just a good but great financial advisor, banker, multi-family office or trustee. In addition, Moenio provides on-going auditing and evaluation services for their clients. Please visit: www.moenio.com for more information.

Media Contact:
help@media.com

Kevin Neal
Moenio, LLC
+1 954-854-3792
[email us here](#)

This press release can be viewed online at: <http://www.einpresswire.com>

Disclaimer: If you have any questions regarding information in this press release please contact the company listed in the press release. Please do not contact EIN Presswire. We will be unable to assist you with your inquiry. EIN Presswire disclaims any content contained in these releases. © 1995-2020 IPD Group, Inc. All Right Reserved.