Unconventional tips

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In this issue I want to illustrate how Artificial Intelligence (AI) could potentially assist us with rudimentary tasks, or provide inspiration. I am not a movie connoisseur, but thought it would be a fun exercise… marrying movie quotes with financial advice – came from the power of a modern AI assistant, Gemini from Google. It is a fun way to illustrate how we could use cutting-edge technology and big data, not only to handle complex analysis, but also to explore new ways to communicate concepts clearly and in a fun way.

With the recent passing of the quintessential James Bond, Sir Sean Connery, I was inspired to reflect on the parallels between cinematic one-liners and a sound financial strategy. After all, a financial plan, much like a successful spy mission, requires intelligence, foresight, and a disciplined hand. Neither shaken, or stirred!

Below are 10 legendary movie quotes with a financial lesson they could subtly imply.

1. Sir Sean Connery from Dr. No (1962)

"Bond, James Bond.""

It is about identity protection: In an environment where online and cyber fraud continues to escalate, be vigilant and meticulous. Confirm who you are dealing with on the other side. Always protect your financial identity, passwords, and sensitive information. Check phone numbers as well as bank accounts. Verify details around any financial transaction.

2. Brad Pitt from Fight Club (1999)

"The first rule of Fight Club is: You do not talk about Fight Club."

Your investment portfolio and performance are private matters: You are in control. It is not about finishing a race on the podium. It is just about finishing well. The best wealth-building is often silent and not comparing yourself with others. Do not chase public trends, or the perceived winners. Focus on your personal and long-term financial goals. Implement milestones along the way in order to measure your progress.

3. Clint Eastwood from Sudden Impact (1983)

"Go ahead, make my day."

Be bold and decisive: Embrace market volatility. Stay invested through the various cycles and avoid getting in and out at the wrong time. Anticipate future financial shocks. It is part of any long-term savings plan. Do not panic. Periodic dips are absolutely normal and similar to seasons in nature. We do not have summer all year round! When prices fall, an investor starting out should be ready to invest even more.

4. Cuba Gooding Jr. in Jerry Maguire (1996)

"*Show me the money!*"

Conduct proper due diligence: Demand transparency. Do not invest in anything you do not fully understand. Ponzi schemes are generally easy to identify. Make sure you know exactly where your money is going and how it is working for you.

5. Roy Scheider from Jaws (1975)

"You're gonna need a bigger boat."

Having enough liquidity, or a contingency fund, is paramount: A small savings account cannot cover a significant financial disaster. Assess your implied liabilities carefully, and where required, make sure you are appropriately covered. An emergency fund should be large and robust enough to handle the truly unexpected 'sharks' out there.

6. Arnold Schwarzenegger from The Terminator (1984)

"I'll be back."

Consistent long-term savings with steady compounding: Do not allow randomness to fool you. Avoid risky bets with a huge pay-offs. Be aware of the probability of something not going as intended. Opportunities, like the Terminator, keeps coming. Be selective. If possible, maintain a disciplined, automatic investing approach. Your regular contributions and "dollar cost averaging" should always provide a return.

7. Al Pacino from The Godfather Part II (1974)

"Keep your friends close, but your enemies closer."

Create a monthly budget and track your expenses: Your biggest 'enemy' is not the financial markets, or even volatility – it is continual bad spending habits and using credit inappropriately. Closely track your spending and understand where the money goes. If necessary, regain control.

8. Vivien Leigh from Gone with the Wind (1939)

"After all, tomorrow is another day!"

Resilience matter: If a life event causes a setback, refocus and plan your next move. Remember the power of a fresh start. While planning is vital, don't let fear paralyze you. Be serious about your future, but have the confidence to take calculated risks in order to achieve your long-term financial goals.

9. Tom Hanks from Forrest Gump (1994)

"Life is like a box of chocolates... you never know what you're gonna get."

Understand diversification: It is also possible for an investor to over diversify – that defeats the purpose. The important point however is, since you don't know which asset class, or investment will perform best, spread your capital across different types. Don't put all your 'chocolates' in one basket!

10. Frank Oz (Voice of Yoda) from The Empire Strikes Back (1980)

"Do, or do not. There is no try."

Commit to take action: Commit to a personal financial plan and follow through with discipline. Execution with regular reviews is the key to financial success.

I hope you enjoyed this. Please reach out if you have any questions.