

As Published In

Forbes

“Are You Hooked On Risk Tolerance And Don’t Know It?”

Author: Christopher Carosa, CTFA

Features: Jordan Fandry

Published: September 30, 2020

Excerpt: “When you only consider timelines vs. emotions in risk tolerance, so many things can go awry,” says Jordan Fandry, Financial Advisor at Manske Wealth Management in Houston. “Circumstances such as, someone retiring in 5 years with a high tolerance for risk could make a move that sets their retirement back by a decade. On the other hand, someone with an incredibly low risk tolerance that is retiring in 5 years might not be able to stomach the investments that would otherwise provide growth and income in retirement, which also negatively impacts their investment goals.”



As Published In



“Reframe 401k Participant Education To Stop Stressing Risk And Start Emphasizing Goals”

Author: Christopher Carosa, CTFA

Features: Jordan Fandry

Published: September 1, 2020

Excerpt: “In so many cases, a financial planning discussion is based on risk tolerance so the adviser in order to determine which ‘cookie-cutter’ portfolio can be used for the client,” says Jordan Fandry, Financial Advisor at Manske Wealth Management in Houston, Texas. “When the main idea is to assign a title, or portfolio, to a client, the essence of financial planning and long-term goals may be overlooked by how the client feels about taking on risk. Unfortunately, the cookie-cutter portfolio based on risk tolerance is an industry norm that has investors hooked or fixated on risk tolerance...Retirement savers should first be able to identify what amount of money it takes to live,” says Fandry. “Whatever amount of money covers food, bills, hobbies, etc. that allows them to live a comfortable life will be a critical step in identifying their goals. This figure will help understand how to maximize savings goals and build out a meaningful financial plan complete with return objectives.”



As Published In



GOLD IRA GUIDE

“Is A Roth IRA the Best Place to Hold Stocks? – 6 Experts Weigh In”

Author: Sarah Bauder

Features: Jordan Fandry

Published: September 10, 2019

Excerpt: One of our experts, Jordan Fandry with Manske Wealth Management, says, “A Roth IRA can be an excellent vehicle to hold stocks because of tax advantages. Realizing, or selling, large stock gains after a position has experienced tremendous growth usually leads to an over-sized tax bill. Typically, these realized gains in taxable accounts lead to the investor giving away a portion of the profit to the IRS. But if the stock is held inside a Roth IRA, all that growth can be realized without taxation upon the sale. This can be even more advantageous than an IRA or 401(k) because those accounts are tax-deferred, meaning later the account owner will pay taxes upon withdrawal. The Roth is tax-exempt which is a very powerful tool for growing net worth over time.”





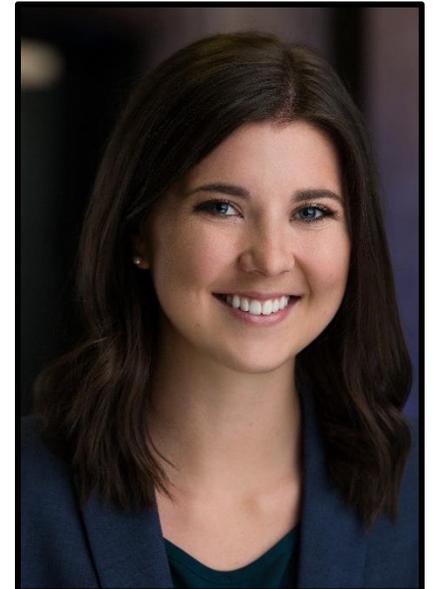
“Five Questions For Your Financial Advisor”

Author: Thais Amaral Tellawi

Features: Jordan Fandry

Published: July 27th, 2017

Excerpt: From time-to-time, the AT Law Blog will be spotlighting posts that we think are relevant to our readers that come from other professionals we know and trust. This one comes from Christopher R. Manske, CFP®, who leads a disciplined and well-credentialed team providing sophisticated wealth management and individualized investment advice. His co-author, Jordan Fandry, was a participant in a leadership seminar sponsored by Manske Wealth Management before beginning her career with the firm.



The College for Financial Planning

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the College for Financial Planning hereby confers the authorization to use the designation*

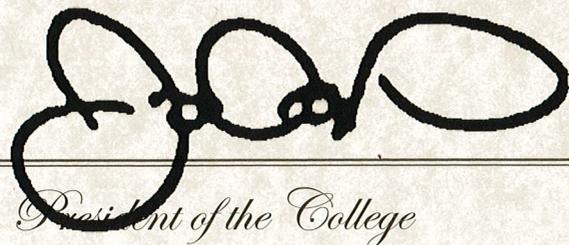
Chartered Retirement Planning Counselor

Presented this day, July 1, 2019

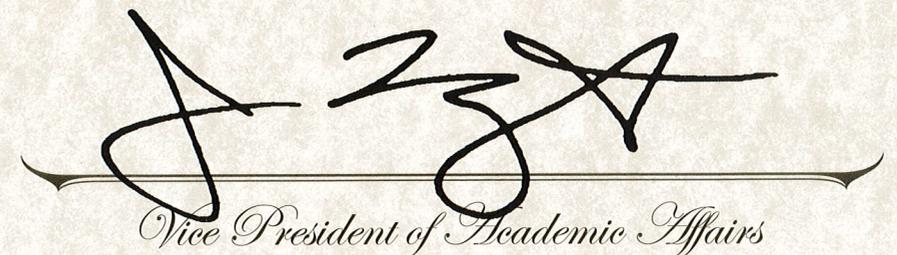
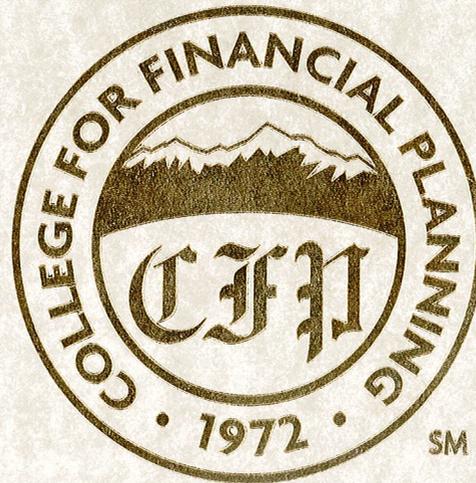
_____ to _____

Jordan Fandry

*who, having satisfactorily completed the prescribed requirements, is hereby authorized to use the
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Whereas,

It is the object of this organization to recognize properly qualified financial advisors with a professional designation.

And Whereas,

The petitioner has fulfilled all the requirements of education, examination, experience, character and commitment to continued professional education needed to qualify for such recognition.

Therefore,

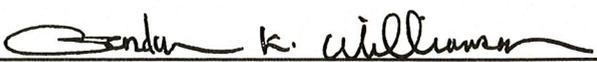
The Trustees of the Institute of Business & Finance by virtue of the authority vested in them and on the recommendation of the faculty have conferred the professional designation of

Certified Fund Specialist

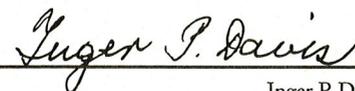
Jordan Fandry

April 4, 2019

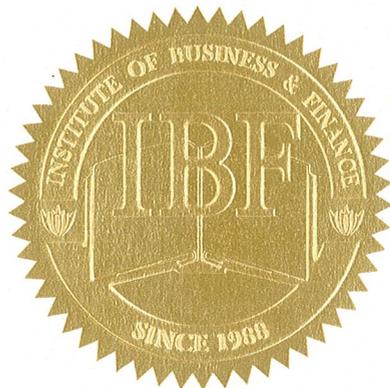
In Witness Whereof, I have set my hand and caused the seal of the
Institute of Business & Finance to be affixed this day.



Gordon K. Williamson, President



Inger P. Davis, Board of Directors



FOR IMMEDIATE RELEASE:

Contact:

Jordan Fandry

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Institute of Business & Finance Announces a New CFS[®] Designee

San Diego, CA, May 15, 2020 - The Institute of Business & Finance (IBF) recently awarded Jordan Fandry with the first nationally recognized mutual fund designation, CFS[®] (Certified Fund Specialist[®]). This graduate-level designation is conferred upon candidates who complete an 135+ hour educational program focusing on closed-end funds, mutual funds, ETFs, REITs, UITs and modern portfolio theory. Over \$12 trillion is invested in mutual funds in the United States; half of all households own shares in at least one mutual fund.

CFS[®] certification requires mastery of portfolio construction, risk measurement, manager selection, monitoring, income strategies, retirement accounts, titling, taxation and the psychological aspects of finance. According to IBF, “The vast majority of investors and advisors do not know how to properly select a mutual fund, understand what criteria are important, asset category correlation or what historical statistical information is a good or poor predictor of what is likely to happen in the future.”

The student must pass three comprehensive exams, complete a written case study as well as adhere to the *IBF Code of Ethics* and *IBF Standards of Practice* as well as fulfill annual continuing education requirements. The CFS[®] program, since 1988, is designed for brokers and advisors who have clients that either own or are considering investing in mutual funds or exchange-traded funds.

ABOUT THE INSTITUTE OF BUSINESS & FINANCE – Founded in 1988, IBF is a non-profit provider of financial education and designations to members of the financial services industry. IBF is the fourth oldest provider of financial certification marks in the United States. In 1988, IBF launched its first certification program, CFS[®] (Certified Fund Specialist[®]). Today IBF offers four additional financial designation programs: CAS[®] (Certified Annuity Specialist[®]), CES[™] (Certified Estate and Trust Specialist[™]), CIS[™] (Certified Income Specialist[™]) and CTS[™] (Certified Tax Specialist[™]).

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The University of Houston

has conferred upon

Jordan Handry

the degree of

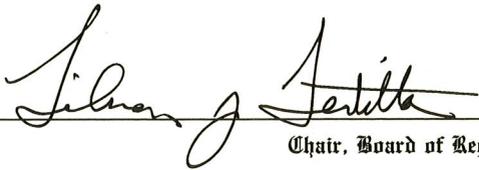
Bachelor of Science

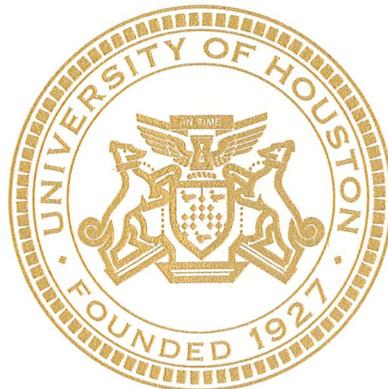
Mathematics

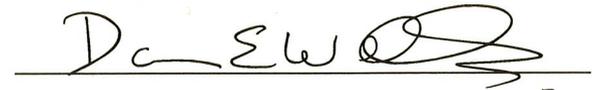
with all the rights and privileges appertaining thereto.

In Witness Whereof, this diploma duly signed has been issued and the seal of the University hereunto affixed.

Issued by the Board of Regents upon recommendation of the faculty of the College of Natural Sciences and Mathematics on this twelfth day of December, A.D. two thousand and eighteen.


Chair, Board of Regents




Dean


Chancellor of the University of Houston System
President of the University of Houston