

Table 4: Why Planners Are Re-evaluating Portfolios

Q: I re-evaluated in the last 3 months/am currently re-evaluating the asset allocation strategy I typically recommend/implement because of anticipated/existing changes in:

Answer Choices	Responses
The economy in general	45.37%
Inflation	41.19%
Market volatility	40.90%
I continually re-evaluate the asset allocation strategy I typically recommend/implement	34.03%
Specific investments	27.16%
Legislation (Build Back Better, etc.)	23.28%
Administrative aspects of investments (cost, lead manager, etc.)	16.72%
Other	5.07%

Source: 2022 FPA Trends in Investing; respondents could select multiple answers