

YCHARTS

A Vote of Client Confidence: Presenting The YCharts Advisor Election Guide

With Samantha Russell & Sean Brown





Samantha Russell
Chief Evangelist at FMG



Sean Brown
CEO at YCharts



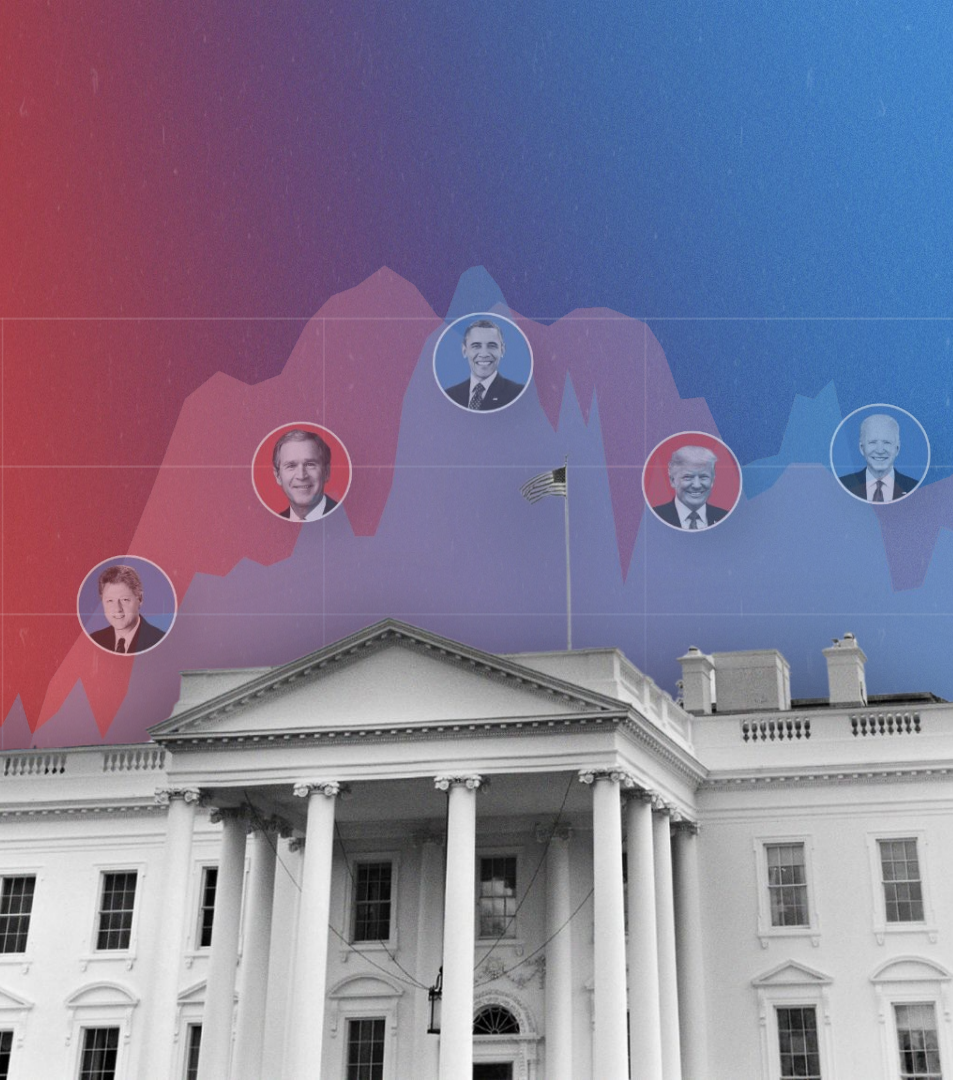
Thank you for joining!

To learn more about YCharts and view our other webinars, be sure to subscribe to our YouTube channel.

Questions can be submitted using the chat feature within the webinar and will be answered as best as possible during the Q&A.

Please reach out to hello@ycharts for more information or...

Start a free trial at ycharts.com

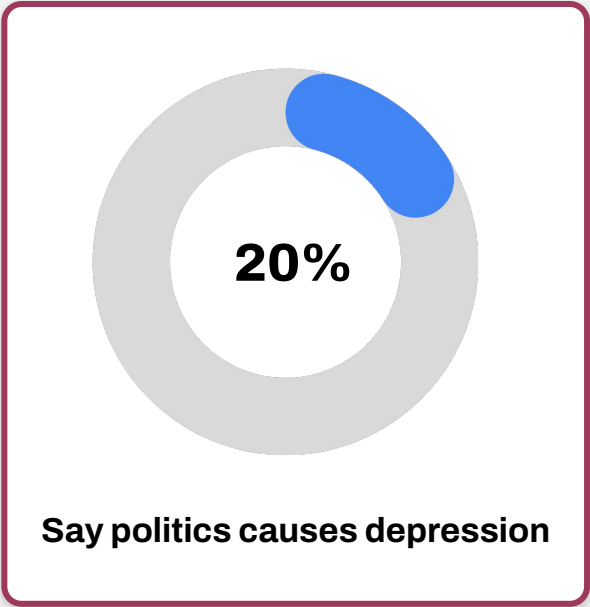
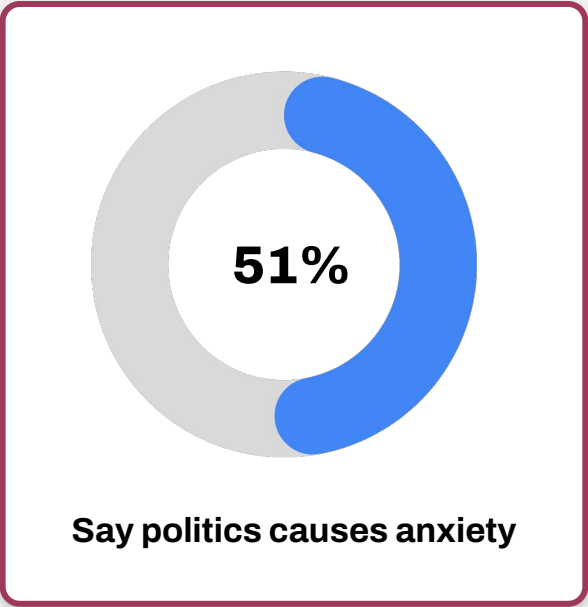


Agenda

- Understanding Client Worries
- Boosting Client Confidence
- Best Practices for Communicating Insights
- Maximizing The Impact of Advisor Solutions
- Q&A

Understanding Client Worries

How Stressed Are Americans During Election Years?



Source: <https://thrivingcenterofpsych.com/blog/political-anxiety-statistics/>

How does this affect Financial Advisors?



Samantha Russell • You



Chief Evangelist at FMG Suite | Marketing + Finance+ Tech | Investment ...

4d •

Advisors, when it comes to the election and its impact on the stock market -- how are you handling it with clients?

- A. It's not something my clients bring up or really ask about
- B. Some clients broach the topic but I tend not to linger on it
- C. I share charts/graphs/emails etc around the election with clients and prospects
- D. I stay away from politics

How does this affect Financial Advisors?



Alex

(edited) 4d ...

Financial Advisor helping people in Media/AdTech make smarter f...

It's case-by-case for my clients... some would rather I not draw their attention to things like market volatility when they tend not to pay much attention to begin with. Others definitely appreciate the heads up on what to potentially expect! Putting things in perspective via a few slides/charts typically tends to put their minds at ease 🙏🙏

Like · Reply

Michael

4d ...

CPA, PFS, CFP, MSP Helping you Connect...

Combination of b and d. I have learned there is no upside to expressing political opinions with clients.

Nate

4d ...

Accountant/Financial Advisor | Personal C...

Most of the time, I feel like they aren't really looking for an answer, but just need to vent about it fro a little bit.

Tackling Common Client Questions



“How will the election outcome impact my investments?”



“Is it a good idea to hold cash during the election year?”



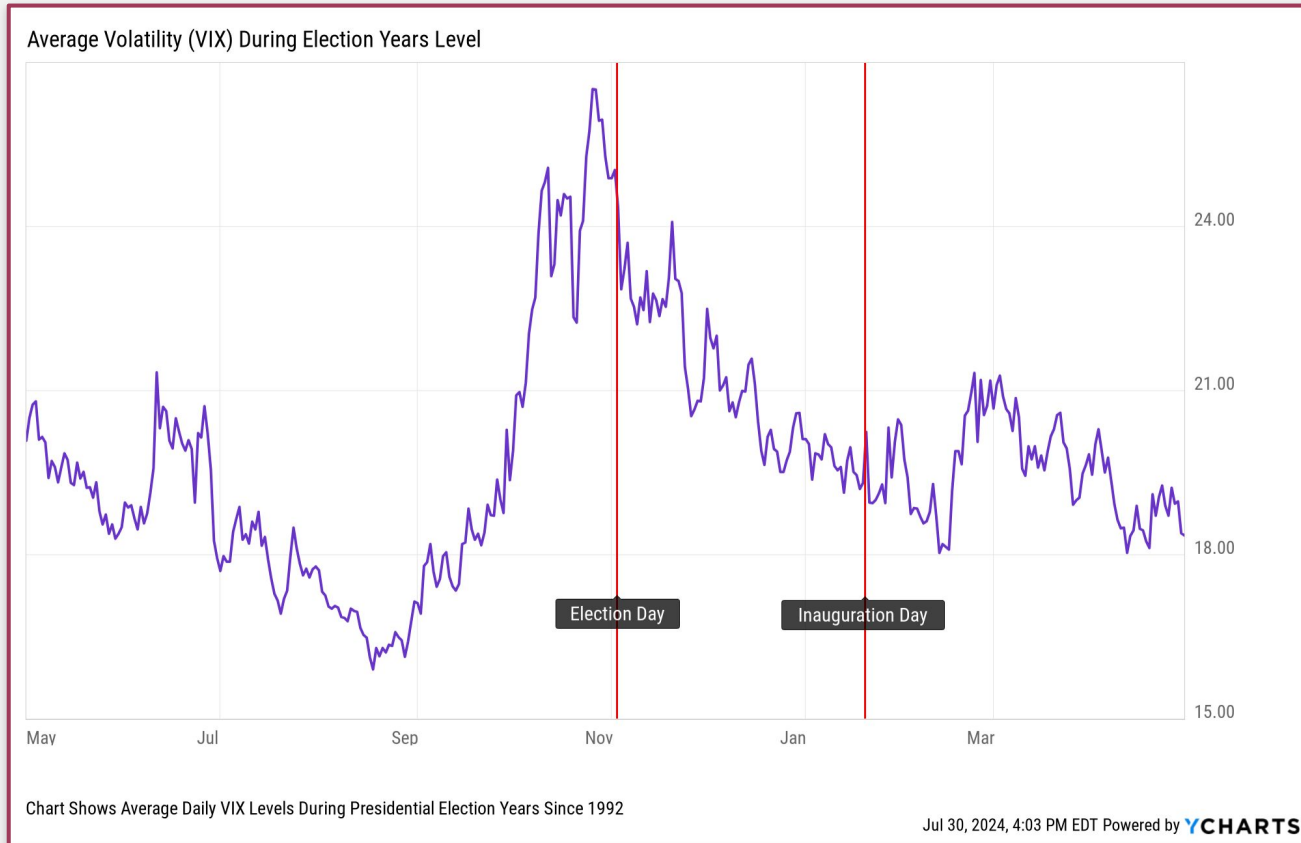
“How should I prepare for market volatility during the election?”



“Should I change my investment strategy based on the election?”

Boosting Client Confidence

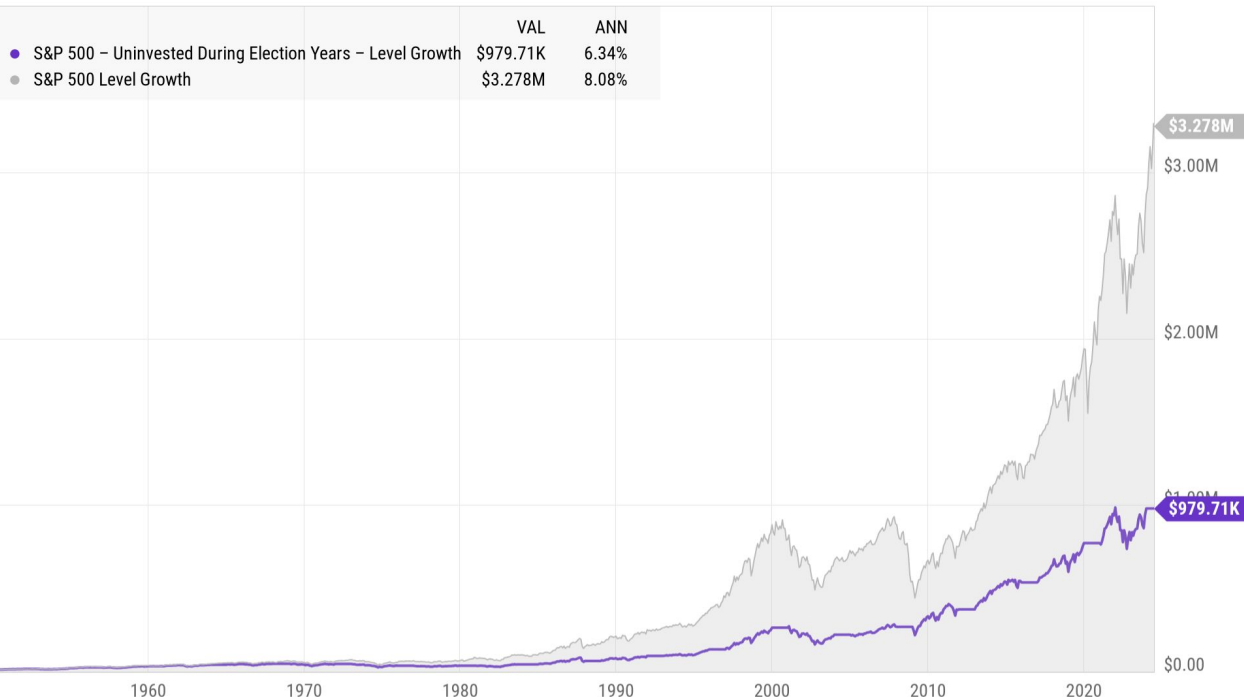
Average VIX Level During Election Years



Avoiding the Cash Trap



Moving to Cash During Election Years (Growth of \$10,000)



Date Range: 01/03/1950 - 06/28/2024

Jul 24, 2024, 3:34 PM EDT Powered by **YCHARTS**

S&P 500 Performance Under Different Presidents



S&P 500 Performance Throughout U.S. Presidencies



Date Range: 01/20/1961 - 06/28/2024

"VAL" = S&P 500 Level at the End of Each President's Tenure

Jul 25, 2024, 11:45 AM EDT Powered by YCHARTS



Kennedy
+19.5%



Johnson
+46.6%



Nixon
-19.8%



Ford
+28.4%



Carter
+30.5%



Reagan
+117.9%



HW Bush
+51.8%



Clinton
+209.8%



Bush
-36.7%



Obama
+181.1%





Trump
+67.3%



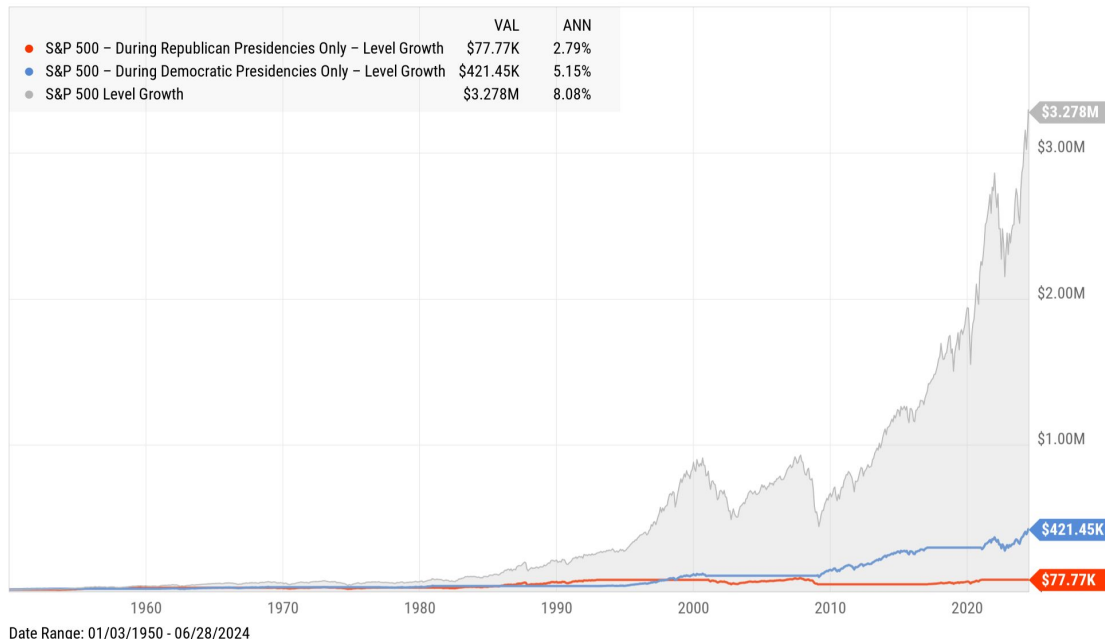
Biden
+41.8%

What if You Invested Only During the Presidencies of One Political Party?



 S&P 500 Investment During Only Republican Presidencies since 1950	2.79% Annualized Return
 S&P 500 Investment During Only Democratic Presidencies since 1950	5.15% Annualized Return
S&P 500 Investment During All Presidencies	8.08% Annualized Return

Investing Based on Preferred Political Party (Growth of \$10,000)



Aug 19, 2024, 11:56 AM EDT Powered by YCHARTS

Best Practices for Communicating Insights

Proactive Communication with Clear Messages



All results in mail

- Liz/WealthKeel** Aug 22
The **WealthKeel Weekly 8/22/2024** 🎉
is your **WealthKeel** Weekly, or what we li... ☆
- Liz Mattingly** 4 Aug 19
Time to schedule your next review
client with **WealthKeel**. As always,... **Inbox** ☆
- Liz/WealthKeel** Aug 15
The **WealthKeel Weekly 8/15/2024** 🎉
is your **WealthKeel** Weekly, or what we li... ☆
- Liz/WealthKeel** Aug 8
The **WealthKeel Weekly 8/8/2024** 🎉
is your **WealthKeel** Weekly, or what we li... ☆
- Liz/WealthKeel** Aug 1
The **WealthKeel Weekly 8/1/2024** 🎉
is your **WealthKeel** Weekly, or what we li... ☆
- Liz/WealthKeel** Jul 25
The **WealthKeel Weekly 7/25/2024** 🎉
is your **WealthKeel** Weekly, or what we li... ☆
- Liz/WealthKeel** Jul 24
Your **Second Quarter Performance Re...**
Hello, The second quarter performanc... ☆

- Reach out to clients proactively rather than waiting for them to express concerns.
- Have a regular email schedule to keep clients informed.
- Use clear, jargon-free language to explain market trends and the importance of staying invested
- Ensure consistency in the messages shared across all communication channels.

Timely Content: Emails



Hi Samantha,

We wanted to take a moment to address the recent market volatility and provide some insights into what is happening and how we are seeing events unfold during this time.


As you may have noticed, global markets have experienced declines recently. Japan's Nikkei 225 index was down over 12% on Monday, and U.S. stocks opened down 4%. The Dow Jones Industrial Average, Nasdaq Composite, and Standard & Poor's 500 have all seen drops which were driven by a combination of factors:¹

- **Weak Jobs Report:** Last week's disappointing July jobs report from the Labor Department has raised concerns about the strength of the U.S. economy. (Although there's been some talk that Hurricane Beryl may have influenced the numbers a bit.)²
- **Tech Earnings:** Recent Q2 corporate reports from major tech companies have disappointed Wall Street.
- **Seasonal Trends:** Historically, late summer through early fall are challenging months for the market, particularly in Presidential election years.
- **Federal Reserve Actions:** The Fed's decision at its July meeting to maintain interest rates at their current levels has added to investor anxiety.
- **Yield Curve Inversion:** The yield curve remains inverted, a phenomenon that often precedes economic slowdowns.³

Timely Content: Social Posts




Instagram Log In Sign Up



Fleur-de-lis
FINANCIAL

What to Expect in an Election Year

“How might the election impact the markets?”



fleurdelisfinancial • Follow ...
Original audio

fleurdelisfinancial Do presidential election years impact the market? Maybe... but not in the way one might expect. Here's some insight on how elections and the market have historically intersected.

#USElections #FinancialAdvisor
#FinancialPlanner
#ChicagoFinancialPlanner
#ChicagoFinancialAdvisor
#StockMarket

12w

3 likes
May 28

Log in to like or comment.

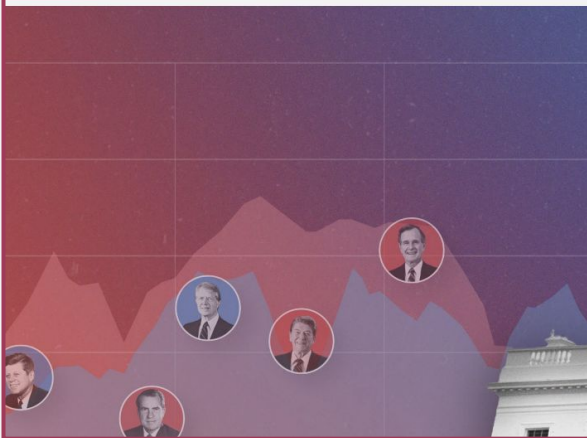
Educational Resources



YCHARTS

How Do Presidential Elections Impact The Market?

The Financial Advisor's guide to answering client questions about the election—with downloadable charts and visuals.



Advisors at Plan First built an “Election and The Markets” info page 



PLAN FIRST.

Votes and Values

Exploring the Relationship Between Elections and Stock Market Performance

Please Access the Materials Below

Content Will be Added as it Becomes Available

[Schedule a Time to Chat](#)



What's at Stake--
Election 2024



Q3 2024--Market
Intelligence

YCHARTS



Personalize your communication based on the client's investment goals, risk tolerance & concerns.



Provide specific examples of how staying invested has benefited clients in similar situations in the past.

Tailored Advice:

Customize your communication to show clients the power of staying invested through all market cycles

Don't reinvent the wheel



Gloria S Garcia Cisneros, CFP® (She/Her) · 2nd
First-Gen Latina Financial Advisor | Empowering Families to Achieve Their...
1mo · 🗨️

Did you know? The S&P 500 has grown regardless of who is in the Oval Office.

After last week, I know the election was top of mind. This usually brings in emotions and worry. As a financial planner, part of my job is to help clients through their emotions by providing perspective and zooming out. Regardless of your political affiliation, below is a chart that may provide peace of mind.

The takeaway? If you're a long-term investor, the occupant of the Oval Office matters less than you might think.

As humans, we try to draw correlations between the numbers of our money and events that impact us emotionally. This is normal, but here is my suggestion:

- Focus on your long-term strategy
- Diversify your portfolio
- Tune out short-term political noise

What do you do to tune out the noise?

#InvestingTips #FinancialPlanning #MarketTrends #BehavioralFinance #PsychologyOfMoney #Mindset #Perspective #WomenInFinance #CFP #DataDriven #PersonalFinance #FinancialEducation #StockMarket

YCharts has great charts that provide perspective!

S&P 500 Performance Throughout U.S. Presidencies

Presidency	Level Growth	AIN
Monroe Presidency Level	71.62	
Johnson Presidency Level	102.03	
Blair Presidency Level	81.29	
Ford Presidency Level	103.93	
Carter Presidency Level	104.23	
Roosevelt Presidency Level	286.99	
W. Bush Presidency Level	602.53	
Clinton Presidency Level	1242.24	
Reagan Presidency Level	1902.52	
Obama Presidency Level	2263.09	
Trump Presidency Level	2708.61	
State Presidency Level	3254.25	

Val: \$3,154M
\$1,000M
\$2,000M
\$3,000M
\$405.54K
\$77.77K

Date Range: 01/03/1950 - 03/28/2024
Max 1,300x 11.48x ADR EDT Powered by YCHARTS

188.8% 186.8% 180.8% 180.4% 180.8% 133.9% 151.8% 100.8% 100.7% 100.3% 100.3% 100.8%

Warren Street Wealth Advisors
325 followers
1w · Edited · 🗨️

Curious about how a divided Congress or a one-party controlled Congress might impact your investment returns? Data shows that the S&P consistently delivered positive average annualized returns in both scenarios. It turns out, there can be a silver lining to gridlock in Washington.

Source: YCharts

#WarrenStreet #Investments #Stock #Market #PresidentialRace

AVERAGE ANNUALIZED S&P 500 PERFORMANCE 1950-2023

CONGRESS	Dem.	Divided	Rep.
DEMOCRATIC PRESIDENT	8.72%	15.72%	14.95%
REPUBLICAN PRESIDENT	1.04%	12.20%	11.70%

Historically, higher average annualized returns have occurred during a divided Congress, where one party controls the House or Senate and the other party holds a majority in the second chamber.

YCHARTS

Wesley Whamond, MBA, CFP® · 1st
CERTIFIED FINANCIAL PLANNER™ Financial Advisor at Sikich
1mo · 🗨️

Newsflash: the Markets don't care about your political preferences.

The team at YCharts researched the growth in the S&P500 since 1950. It is broken down by investing the entire time and only when each major party had the presidency.

Have a plan. Have discipline.

Investing Based on Preferred Political Party (Growth of \$10,000)

	VAL	AIN
S&P 500 - During Republican Presidencies Only - Level Growth	\$77.77K	2.80%
S&P 500 - During Democratic Presidencies Only - Level Growth	\$405.54K	5.11%
S&P 500 Level Growth	\$3,154M	8.05%

Date Range: 01/03/1950 - 03/28/2024
Jun 17, 2024, 2:35 PM EDT Powered by YCHARTS

SIKICH

What's the origin story of YCharts? What's the importance of discipline?

2 reposts

Maximizing The Impact of Advisor Solutions

Coming Your Way - Communications You Can Use Today



Social Post

As we approach the 2024 election, many investors are understandably anxious about how political shifts might impact the stock market.

However, history tells a different story. Look at this chart from YCharts and see how the market has navigated past presidencies:

- 👉 **Long-Term Trend:** Historical data shows that the stock market has generally trended upward over time, regardless of which party holds the presidency.
- 👉 **Company Growth:** Many successful companies were founded and flourished under various administrations, contributing to overall market growth.
- 👉 **Market Priorities:** Factors like earnings growth, economic trends, and technological innovations typically influence the market more than political shifts.
- 👉 **Investor Focus:** Remember, when you invest in the stock market, you're investing based on your time horizon, risk tolerance, and specific goals—not specific political outcomes.

While elections may create short-term fluctuations, historical trends suggest that long-term market performance is often driven by broader economic factors. Stay focused on your investment strategy, and let history guide your decisions.

#Election2024 #MarketTrends #InvestingPerspective

Email

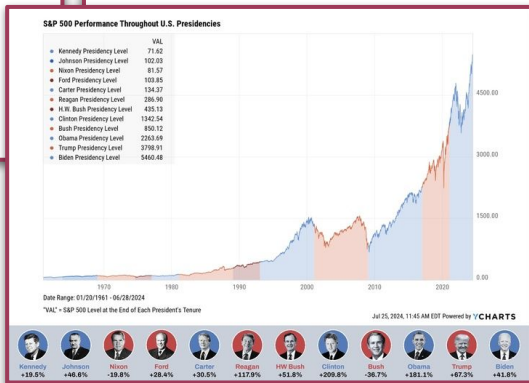
Subject Line: How do presidential elections impact the markets?

Dear [Name],

With news headlines constantly covering every aspect of the presidential race, you may be wondering how the 2024 election may impact you and your finances. After all, every four years, uncertainty about the next president and their economic policies can lead to more uncertainty in the minds of investors.

The long and short of it is you may care passionately about who wins, but your investment portfolio probably doesn't.

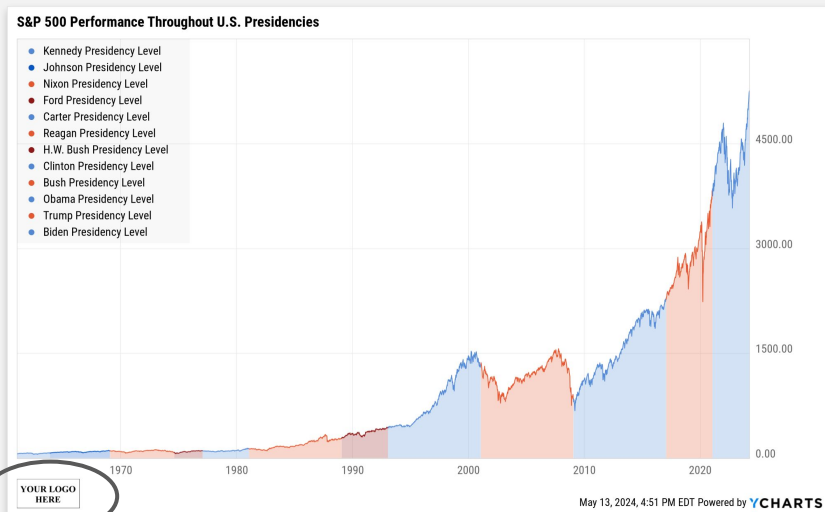
As this chart shows, while the stock market has fluctuated under the leadership of both parties, the S&P 500 has trended higher over the long term, no matter who's in office. The trend suggests that the stock market's performance may have more to do with the overall strength and resiliency of the U.S. economy rather than the person who sits in the Oval Office.¹



Leveraging Client Communication Enablers

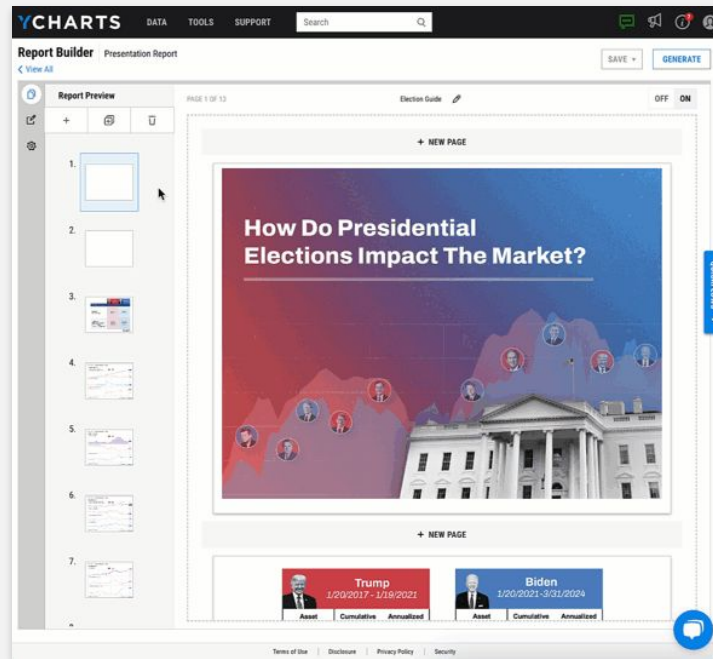


Custom-Branded Client Communication



**YOUR LOGO
HERE**

Pre-Built Presentation Reports



FMG Election Content In The Dashboard



The screenshot displays the FMG dashboard interface. At the top, the FMG logo is on the left, and navigation links for Marketing Calendar, Inbox (1), Drafts (1), and Compliance (2) are on the right, along with a user profile for Samantha Russell. A left-hand sidebar contains various menu items like Website, Blog, Automated Marketing, Email, Social, Events, SETTINGS, Profile, Contacts, EXTRAS, and Help. The main content area features a search bar with the term 'election' and a 'Search' button. Below the search bar, there are tabs for content categories: All (13), Web Content (1), Emails (4), Social Posts (6), Greeting Cards (0), and Downloadables (2). A table lists the search results with columns for On, Title, Type, Author, and Actions.

On	Title	Type	Author	Actions
<input type="checkbox"/>	New Client and Prospects: The Impact o...	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	New COI: The Impact of Elections on th...	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	Election Day Fun Facts	Social Sequence	FMG	Details Use
<input type="checkbox"/>	Financial Friday: Interesting Facts re: Invest...	Social Post	Do It For Me	Details Use
<input type="checkbox"/>	In Review Fun Election Day Facts [Carou...	Downloadable	FMG: Premium	Details Download
<input type="checkbox"/>	Investing in a Presidential Election Year – Cl...	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	Investing in a Presidential Election Year – C...	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	March 2024 DIFM Financial Friday Tips Soci...	Social Sequence	Do It For Me	Details Use
<input type="checkbox"/>	November 2023 DIFM Non-Financial Social...	Social Sequence	Do It For Me	Details Use

Get your Guide!

YCHARTS

How Do Presidential Elections Impact The Market?

The Financial Advisor's guide to answering client questions about the election—with downloadable charts and visuals.

Are you wondering how the presidential election could affect your investments? Every four years, uncertainty about the next president and their policies leads to more uncertainty in the minds of advisors and their clients. 2024 is no exception, given the election will likely be a rematch between the last two presidents.

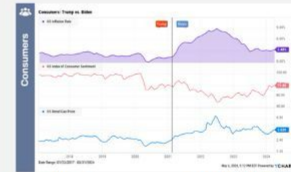
We created this guide to answer the most commonly asked questions that financial advisors hear from clients during an election year. The findings contained in this guide are purely data-driven and do not serve as investment advice.

If you would like to share any of the visuals in this guide with your clients and colleagues, click the link below each image for a free download. Ycharts clients can click "View & Modify" links to customize charts with their firm logo and colors.

Not a YCharts Client? [Start a free trial](#) to access these features.

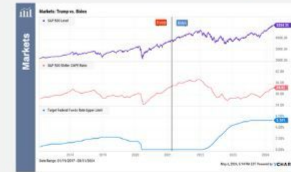


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3

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Q&A

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