

Video Insight - Children and Grandchildren

With most of the clients I've worked with over the years, their biggest concern is their children and grandchildren or future grandchildren and how they will handle having money.

Because I have been blessed to work with people that have more than enough in terms of their financial dollars which means that it will likely be a family legacy. And how does that affect them?

And there is no one right answer to that. There's been a lot of research and they can point you in directions, but at the end of the day, the clients really want to know, how do I make sure everybody's okay after I'm gone?

And that takes a lot of work with relationships and building them and understanding families. And that's what we're here to do.