Video Insight - Your Financial Journey

When I meet potential clients for the first time, it's really about getting to know them, finding out what their hopes and their dreams, but also their fears and anxieties are. And if you don't have that conversation, you'll never know what it is they are looking for. And sometimes they don't know. So we just ask a lot of questions.

We get to know each other, learn about their families, their children, their parents. Really, it is about just discovering. It's like having a puzzle of their life and a bunch of pieces. And through working with them, we get to put everything together for their financial journey, for feeling comfortable and confident that they can have a dignified retirement. They won't be a burden to their children.

They can go on those wonderful trips, they can put their children or grandchildren through college. It's very personal. It has to be, because these are people's life savings we're talking about. This is their legacy.