



Alan Sylvestre

The art of implementing a plan that works for you includes using tools that empower you during the most difficult times. Most plans need to with-stand decades and be flexible enough to be adjusted along the way. Tools may change a bit, and the purpose of a plan empowering you, reducing stress, and freeing up time for you to do the things you love will always be consistent. It is paramount to our team to accomplish this for you. We see ourselves as a Human Services organization specializing in Finance. The finance is the tool to help accomplish the human service.

We know that your plan is specific to you and needs to be built around your context, expectations, and we need to give you time to practice its' implementation to ensure that it does what you want. This requires a significant amount of input on both of our parts and an approach that requires strong listening skills. The art of the practice is something that we would like to go through with each of you. We think it is very valuable to your success.

Now more than ever as I am almost into my fourth decade of serving others, I can understand how we get caught up in wanting to educate those we serve with our knowledge. Our team has well over 100 years of experience between us. We realize that we have placed an importance on our agendas for meetings, and it is very portfolio and market heavy. When I think of that and I position myself on the other side of the table, as a client, I know that none of that really matters if it is not placed in the context of the things that are important to you. Life experiences, family, financial security, legacy, philanthropy, and much more. How is your money helping you with those goals? The numbers on the papers that we print for you needs to translate into a positive effect on your lives. Our team should understand what success means to you, not just if your portfolio measures up to an index...and, we do truly want to understand.

We have built a challenge into our 2024 service goals. A challenge that our team works to diagram what success looks like for you and your family. That we really take the time to have an honest discussion with you about the periods in your lives that money and investments can have the most positive effect and we implement a plan to make it happen. We understand this truly is individual to you.

Too many times we have seen clients pass away with monies left unused and bucket lists not complete or not even started. To me, it is always a bit somber in the beginning of the year when reading the e-mails and cards from clients who are no longer with us.

For those of you who know me, I can be heard encouraging individuals with neuro-differences to use their difference as their "super-power." For me, my super-power has been the ability and desire to observe and learn from others. In the work that my team and I do for you, the opportunity to observe and learn is bountiful every day. You have taught me more about how to serve other clients than any textbook or seminar I've gone to.

So, I thought for this "From the Desk of" I would share a couple of the key things I've learned from clients over the years, with hopes you might find one or two helpful. Perhaps even better, that they

will stir you to have conversations with your loved ones and our team, so we can continue to draw the “picture” of what is important for you and create a measurement of success that is real to you.

- ✚ The way to make good decisions is to have good information, and the way to have good information is to ask good questions.
- ✚ As you get older, continue to strengthen your mind, even if your body gets weak.
- ✚ Learn about others, and truly care about what you learn.
- ✚ Don't beat yourself up over a decision you've made. You made the best decision you could with the information you had. Now that you have more information, make the best decision you can with the information you have now.
- ✚ Life is short, eat dessert first!

I hope this finds your 2024 getting off to a great start. We all look forward to seeing and working with you in this New Year. Till then, be well!

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