

Second Opinion Service

...a message from Nathan Sadowski

As you know, we represent a select group of individuals, families and business owners, for whom we can have a major beneficial impact on. We only enter into a handful of new relationships per year, many via personal introductions from our existing clients. I wanted to offer you a service that we provide to our best clients for the people they care most about. Why now? In my 14 year career, I have never seen so much money in motion; so many people wanting someone to “check under the hood” to make sure they are on the right path. People are very unsure of what to do now.

To help the people you care about make informed decisions, we now offer our second-opinion service. We’ll take them through the same connect and design process you experienced to help them get very clear on where they are now and where they’d like to go. We’ll examine any of the gaps that may exist. My mother was an accountant and my father was a farmer and they always told me, “it never hurts to know more about your current situation”.

One of three things will happen:

1

We find out that they are in good shape and advise them to stay where they are, or,

2

We find out that they could better their situation. If we are not a fit for their particular situation, we’ll be happy to point them in the right direction to a financial advisor who can work with them more effectively, or,

3

We find gaps in their current plan and feel we could provide a significant advantage in helping them reach their goals. We would then explore the idea of working together with them.

Who do you care about the most that would benefit from this service?