

Our Second Opinion Service

...a message from Nathan Sadowski

As you know, we help first generation wealth creators navigate through important life milestones. We only enter into a handful of new relationships per year, many via personal introductions from our existing clients and professional networks. In my 17 year career, I have never seen so much money in motion; many people wanting to "check under the hood" and make sure they are on the right path. People are unsure of what to do, especially with what's going on in the world today, economically, politically and socially.

We now offer our second opinion service to help the people you care about. We'll take them through the same process you experienced and help them get clear on where they are now and where they'd like to go.

One of three things will happen:

1

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

2

We'll find out that they could better their situation. If we are not a good 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'll 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 who would benefit from this service?