

NO. 2

Everyday Scenarios

and sensible solutions

Preserve Protect Simplify

Everyday Scenarios

I'd much rather spend my time on worthwhile causes than on financial paperwork.

What I need is a way to balance passion and responsibility.

"There simply aren't enough hours in the day for what I want to do, and what I *ought* to do," Anne explained, flashing the smile that has charmed more than one major donation to the causes she supports. "So, naturally, the not-my-cup-of-tea matters"—this with a rueful glance at the file box she'd brought with her—"are in danger of being neglected. It's not that I can't deal with them, I'd just prefer not to. Could you help *simplify* things?"

Of course we could. Simplifying life—dealing expertly with complex financial and trust matters for clients who'd rather spend their time in other ways—is precisely *our* cup of tea. And because we are not fragmented by other priorities, we can serve up custom solutions that focus exclusively on the interests and wishes of the client.

Our first task for Anne, was digging into her meticulously organized file box (and three others she sent later). Name it, and it was there—bank, brokerage and accountant's reports; stock and bond certificates; annuity and trust documents; bills and credit card statements. "So much," sighed Anne, "and so time-consuming."

Not a problem, we assured her. Creating timely—and time-saving—solutions for clients, is one of our specialties. For Anne, whose wide ranging charitable endeavors are the stuff of legend, as are her wide-ranging travels—that meant lifting the burden of day-to-day financial oversight.

Working with her attorneys, accountants, and other advisors, we put together a coherent strategy for all of her investments—trusts, retirement accounts, everything. Having implemented that, we monitor it, adjust as necessary, report regularly but most importantly for Anne, handle all the details she'd rather not deal with.

We pay her bills and expenses; provide her accountants with necessary tax information; and even identified some credit card charges we felt were unjustified, which were subsequently removed. We customized a reporting system—as we do for every client—to Anne's preferences. "Keep me informed," she said, "but not *too* informed."

Of course, the services we provide for Anne may not be the services you require. That's the beauty of our custom solutions commitment. We design answers as unique and specific as individual client needs—and strive always for levels of satisfaction as high as Anne's. No, we didn't put more hours in her day; we just turned more of them into hours she can spend as she chooses.

In the interests of client confidentiality—which we take very seriously, Anne is a composite example. The services described, however, are real, and represent just some of the ways we help clients preserve, manage and transfer wealth.