

Listening & Understanding You is why we are here

Your Values

- You value spending time and money with family over other material purchases.
- Be present and create memories with the family

Your Vision, Beliefs & Desires

- Apple is a favorite. Do not sell.
- You mentioned that you prefer to avoid 'sin stocks' in your investment portfolio.
- Stree-free days at the beach with wife and kids.
- You would like to donate a portion of your estate to charity. You have identified two charities that you would like to donate a portion of your estate: Humane Society and CharityWater
- You have mentioned you want to have your kids take over the business.

Your Goals

- You want to buy a boat.
- You want to travel to Alaska and go whale watching.



- You would like to go skiing.
- Buy a beach house.
- You both want to make sure their grandchildren, Charlie and Lili, have education funding in place.

