FIDUCIENT ADVISORS

A Journey to Financial Clarity

David and Sarah's journey highlights the impact of proactive financial planning. With Fiducient Advisors' guidance, they transformed anxiety into confidence, living now with clarity and purpose while setting a strong example for their children.

Client Profile

David and Sarah Thompson, early 50s, have a significant net worth and a complex portfolio of trusts, stocks and real estate. David, a tech entrepreneur who recently sold his startup and Sarah, a former corporate lawyer, now focus on philanthropy in education. They have two teenage children, Emma and Jake, and live in a prestigious neighborhood.

Objectives & Challenges

- Simplify the financial landscape to reduce anxiety and gain control, help address hidden fees, inefficiencies in investments and complexity in managing trusts, stocks and real estate.
- Plan responsibly for children's education and financial future, align financial strategy with personal values and long-term goals as well as secure children's educational and entrepreneurial goals.
- Maximize tax efficiency for family and philanthropy and unveil and potential tax inefficiencies that may cause potential overpayments

Solutions Provided

Comprehensive Financial Review

- Identified inefficiencies and high fees in the investment portfolio, streamlining assets into a cohesive strategy.

Tax Efficiency & Estate Planning

- Developed a tax-efficient strategy to reduce the annual burden and updated the estate plan for clear wealth transfer to their children.

Education & Engagement

- Educated the family, including Emma and Jake, on financial planning, and fostered collaborative decision-making between David and Sarah for enhanced spousal engagement.

Long-Term Impact

With newfound clarity, the couple funded Emma's Ivy League education, supported Jake's entrepreneurial ambitions and enjoyed a stress-free family Europe vacation.

Lower Fees:
Boosted investment returns, expanding philanthropic initiatives.

Tax Efficiency:
Reduced tax burdens, freeing resources for family and charity.

Confident Estate Plan:
Helped ensure legacy supported children and aligned with values.

Stronger Partnership:
Fostered open, collaborative financial discussions between David and Sarah.

Empower your family's next generation to manage wealth responsibly and help build a lasting legacy.

Contact Fiducient Advisors.

Contact Us

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www.FiducientAdvisors.com