FIDUCIENT ADVISORS

Building Confidence for the Next Generation

This family's story highlights the power of proactive planning for future generations. Through tailored financial education and fostering open communication, Fiducient Advisors not only addressed the family's immediate needs but also built a strong foundation for a confident, financially savvy next generation.

Client Profile

This high-net-worth couple in their 50s, wealthy professionals with a complex estate and diverse investments, are focused on managing their substantial assets. They have four young adult children in their 20s - one in medical school and three pursuing careers across the country. With a significant net worth and intricate investment portfolio, they seek a comprehensive financial plan to secure their legacy and support their children's future.

Objectives & Challenges

- Prepare the next generation to responsibly manage their financial legacy by offering personalized education and support for planning for their future and education all while addressing their concerns about feeling overwhelmed by family wealth.
- Cater to diverse financial needs and knowledge levels among children, providing a safe, engaging space for them to learn, ask questions and offer reassurance to parents that their legacy will be well-managed.

Solutions Provided

Personalized Financial Education

- Held quarterly meetings to address each child's unique financial needs.
- Covered topics like budgeting, maximizing retirement plans, home buying, understanding market trends and basic economic principles.

Tailored Approach

- Adapted discussions to each child's life stage for better engagement.
- Fostered open communication for questions without intimidation.

Parental Involvement and Feedback

- Regular check-ins to align on goals and track their children's progress.
- Reinforced parents' confidence in their estate plan by showing the value of their children's growing financial literacy.

Long-Term Impact

The family is united in their wealth management, with parents reassured about the future and children gaining confidence in handling financial responsibilities.

Confidence for the Next Generation:
The children are now better equipped to make informed financial decisions, ensuring the family's legacy is preserved.

Stronger Family Bonds:
Regular meetings fostered trust and open communication.

Enhanced Parental Peace of Mind:
The parents expressed deep gratitude for the proactive steps taken to support their children, easing concerns about their wealth's future.

Empower your family's next generation to manage wealth with confidence and responsibility.

Contact Fiducient Advisors.

This document contains a hypothetical client example created for illustrative purposes only. This does not constitute an offer to purchase or sell any securities and does not represent a specific investment recommendation. No investment decision should be made based on this information without first obtaining appropriate professional advice. There is a risk of loss with any investment. The example is not based on any actual client or specific client circumstances. It is intended to demonstrate the types of clients we may work with and the services we provide as an SEC-registered investment adviser. Registration with the SEC as an investment adviser does not imply a certain level of skill or training. The details in this example are entirely fictional and do not represent any current, former, or prospective client of Fiducient. Past performance is not indicative of future results, and any discussion of investment strategies, approaches, or outcomes is for educational purposes only and should not be construed as a guarantee of future results. All services mentioned are subject to the terms of an advisory agreement and may vary based on the specific needs and objectives of individual clients. Please consult with your advisor or a professional before making any financial or investment decisions. For additional information about our firm, please refer to our Form ADV, available upon request or on the SEC's Investment Adviser Public Disclosure website at www.FiducientAdvisors.com

Contact Us

800.260.5445

www.FiducientAdvisors.com