



August 22, 2019

How to stay "young and happy"

I had lunch with a long-time client this week. He's a retired doctor who served our country decades ago and has so many great stories to share. He is extremely intelligent and still curious enough to learn new things.

Interesting fun fact: We have [Pacific Capital](#) clients as young as 19 years old (professional athlete) all the way up to 95 years old (not this gentleman). I believe we can learn from any of the clients we serve.

I asked this retired doctor at lunch what advice he would give to people now that he's had 25+ years in retirement. This is a brief summary of what he said:

- ✓ Stay active and stay young
- ✓ Don't always act so old and grumpy
- ✓ Get involved in worthwhile causes
- ✓ Use your experience to mentor and inspire
- ✓ Create memories and traditions with families (he takes grandkids to Yosemite and to watch his Stanford alma mater football games)
- ✓ Keep your body moving (he plays paddle ball, golfs, and loves to hike)

It's no surprise he's outlived all of his friends. He said every few years he has to get a new golf group at the country club because people his age are passing away...then with a twinkle in his eye he said, "I fit in more with the younger folks!" One piece of positive feedback he shared with me was, "I've worked with many financial advisory firms over the past few decades and what stands out with your firm is high touch personal service. You have great people on your team and they all get what's important." That meant a lot to me to hear that! I appreciate his trust and also his wisdom! Hope you find something valuable in his advice.

If you'd like to discuss your own financial life and get a professional checkup done, schedule a brief Goals Conversation® with our team by visiting our [website](#) today - no cost or obligation involved. You may also click [HERE](#) for our google reviews.

