

December 8th, 2022

<<First Name>>,

If you were to unexpectedly pass away, what's the first thing you've told your family to do? Are they up to speed on everything money-related in your family? Would they know who to call? I know that's a daunting question. But seriously. Think about it.

"My mom said, 'If anything ever happens to me, just call Chad.'" These are the words of a very nice lady in her 50s who came to our office last week.

Sadly, her mom passed unexpectedly. I stood up and gave her a huge hug when she said that. Couldn't help it - I do feel a heavy stewardship for this role.

I'm supposed to be the one they call if their parents die. That's some serious trust. Nearly every client family we work with has children, and we advice and counsel with those children. Helping multiple generations make smart money decisions is a special opportunity.


It's rewarding to work up and down the family tree. Your kids will inherit more than money and stuff you leave behind-they'll inherit attitudes, values, principles and whatever you've taught them. It's in those first meetings after a loved one passes where I see the reflection really happening on how people interpret what lessons were passed down.

This year my last living grandparent passed away and I saw how it affected my dad and his sisters. I'm thankful for this trust families give me and my team. Won't ever take it for granted.

Ps. Having a client dashboard that syncs all of your finances in one place and keeps all your documents organized and safe brings real peace of mind. If you are not yet a [PACIFIC CAPITAL](#) client and want to review your investment strategy and overall financial life, simply [click here](#) to schedule a time to talk with us.

Sincerely,



Alex 

"They're so authentic, give the energy it deserves, and provide so much complete peace of mind and confidence in a strategic plan!"



Schedule a Call