

RAYMOND JAMES®



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*Top: Craig, Kayleigh
Bottom: Ben, Kim, Peter*

Dear Friends,

The Family Meeting: Why is it so important?

Gathering family together for a discussion about finances may seem daunting. The good news is, we can help!

Starting a conversation with your loved ones about your financial plans and goals can be difficult. However, it is the best way to ensure that your wishes are carried out and you and your hard-earned assets are protected. By having a family meeting, with your trusted and experienced financial advisor present to help facilitate the conversation, you are taking the first step toward achieving the security and stability you desire.

Lack of communication between you and your family members can disrupt even the best-laid plans and could harm your family's financial future or, even worse, family relationships. A family meeting allows you to communicate your wishes regarding who you have chosen to act on your behalf in the event you cannot do so. At a family meeting, you can ensure your family will have the proper understanding and support in handling your affairs once it becomes necessary. If your loved ones better understand your goals and desires, the plans you have in place are more likely to be executed smoothly and without tension.

FAMILY MEETINGS CAN HELP YOU:

- Communicate wishes to your family while you have your desires clear in your mind
- Overcome the reluctance to talk about difficult issues by having your financial advisor facilitate
- Minimize emotion by discussing the issues in a more formal setting

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- Reduce potential for family disagreements and ensure that everyone who will be involved is on the same page regarding how your affairs will be handled
- Introduce your loved ones to your advisor, who will be integral in supporting them and you during periods of need

Once you have conducted the meeting, your financial advisor will memorialize your wishes in writing. This will make it easier for him or her to implement your plans in the event it becomes necessary.

If you are interested in scheduling a family meeting, or would like to learn more about its benefits, please let us know today.

Sincerely,



Peter L. Mendall, CFP®

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