



THE DISTELFINK – A E I O U

January 10, 2011

Just as the five vowels are fundamental building blocks in many of our language structures, so too are the five words I've chosen to represent my advisory practice through the frameworks for the Distelfink in 2011.

Appreciate - Being able to seek beauty or express gratitude through appreciation is so vital and enriching to one's life.

Educate - Education is the cornerstone to the approach I take with clients. Sharing information and guiding people to make better financial decisions because of the knowledge they've gained, is truly powerful.

Inspire - Being inspired or inspiring others is like legal cocaine for me – it just feels so good, and it's so much fun. It can even lead to taking initiative and becoming more productive – who knew?

Organize - Getting organized, and helping others make sense of the confusion, makes life easier; and frees up energy to enjoy other people, places, things and priorities.

Understand - To understand is also an essential component of what I do too. Helping others grasp new, and sometimes complex, financial concepts, and ensuring that they really understand their meaning and importance, is so gratifying, so empowering, for both client and advisor.

I am thrilled to be guided by these words and their meanings as I continue to write, and work with clients, in the weeks and months ahead. As part of an industry that has been ridiculed by the media and the public for its greed and deception, and deservedly so for many of the outcomes in recent years, it feels right to move forward within my practice, letting these few simple principles lead the way.

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