Sydney Fair

Sydney Fair has worked for 25 years at a local defense company.  Sydney’s aspirational life goals  include saving for retirement, helping their kids with college expenses, and preparing themselves, along with the next generation of their family, for financial success.  Sydney tends to be logical and realistic in setting and assessing their ability to accomplish their financial goals.  Sydney has seen other family members fall short of retirement savings and often worries about their own level of savings and what income it might provide during retirement.  Sydney knows a co-worker that depleted an inheritance within 3 years and wants to make sure any future inheritance is well cared for.  Sydney is receptive to advice and views the advisor relationship as a collaborative partnership.  Sydney loves that we do a deep dive into their financial goals and periodically stress test their plan.  Sydney has worked hard saving for many years including maximum savings into the company retirement plan and employer stock purchase plan.  After years of saving, Sydney understands how their family wealth was generated, what it took to get here, and wants to know the best way to minimize risk while still achieving all of their long term goals.

Sydney tends to be kind and thoughtful.  Their family brought us a plant to show their appreciation for our firm’s services over the years.  Their family’s active lifestyle keeps them involved in their community, volunteering for local organizations and school alumni.  Sydney coached the kids’ youth soccer teams when they were young.  The appreciation for team sports has kept Sydney involved in a few club teams even with the kids grown.  They juggle their busy life with a desire to travel to interesting places around the world and always share their travel recommendations with us.  On their last trip to Italy, Sydney sent us a family photo taken in Rome.

We’ve always enjoyed our relationship with Sydney and their family.  We’ve been there when it counts, providing the timely and appropriate information to make life’s financial decisions.  This is what drives the relationship today and will continue to drive the relationship for many years to come.