



What happens when the technical phase of planning is fueled by your family's wisdom?

Inside the walls of Cedar Brook, we share a fundamental belief that if your opinion is valued, you'll give it. And when people feel truly heard, they're able to dig deeper into the well of their insight. Cultivate Your Contributions™ is about the multiple layers of contribution required to create a plan that feels like *your plan*. The first layer is getting to know you as the central figure of your own planning.

From the consumer's standpoint, it can be tough to discern the motivations that are in the room when you initiate a new advisory relationship. Even conversations that begin with endearing get-to-know-you questions can represent a false start. Sometimes the questions are put on the table as ice-breakers. Other times, they're used to create a false sense of familiarity; one that gets the consumer closer to a sale faster.

At Cedar Brook we like to say, "it's not about the questions you ask, it's what you do with the answers." Whether it's the first planning cycle with a new family, or a planning update with a longstanding client, we Cultivate Your Contributions™. Our questions are an invitation to your intellect: a drawing agent for your wisdom and your achievements to come into the planning process itself. Your knowledge fills the room as we roll up our sleeves behind the scenes to create and vet your right-fit solutions.

Cultivate Your Contributions™

When you actively celebrate team members' contributions, and their creativity is fueled by an awareness of the family's wisdom, the resulting plan becomes a robust reflection of your ideal future.

Life is dynamic and planning is multi-faceted. There typically isn't one right answer. In contrast to a lone-ranger model – where individual advisors work on individual plans – we believe that a cross-pollination of intellectual capital becomes a multiplier for a family's most poignant solutions. Cultivate Your Contributions speaks to our firm-wide culture in which creativity is invited to incubate and grow.

There's a third layer to Cultivating Your Contributions. Each of our team members has an authentic desire to be part of something bigger than themselves and broader than their individual contributions. So, we begin with people who are highly engaged, and then we foster a culture in which everyone's intellectual capital and creativity is invited into the planning process. When you actively celebrate team members' contributions, and their creativity is fueled by an awareness of the family's wisdom, the resulting plan becomes a robust reflection of your ideal future. That's what it means to Cultivate Your Contributions.

As always, feel free to reach out to us with comments or questions on this or other planning concepts.

Cedar Brook
GROUP

CULTIVATE TODAY.™

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