# Weatherly's Boutique Approach Strengthens Family, Business Relationships

**We're observing a trend of consolidation in the RIA industry. What does the future look like for Weatherly?**

We've made the deliberate decision to maintain a boutique approach to service and culture, providing a unique value proposition for our clients. We never want to sacrifice the quality of service that we provide to our current and future clients, so we evaluate each potential relationship with care. This approach has created deep relationships with client families over the course of generations and has allowed us to continue to focus on our two core pillars – maximizing after-tax and after-fee returns via custom portfolio creation and delivering high caliber, bespoke advice to our clients. Our service reflects a deep belief that success carries a responsibility to give back and create opportunities for others, so we continually invest time and resources in our team and community.

**Given the culture of building relationships over generations, how does Weatherly work with families?**

Legacy building is always at the forefront of our advice. We seek ways in which we can grow our clients' financial and personal lives, allowing them more time to focus on their business, family, and community. We organically build relationships with the next generation at a pace our clients are comfortable with, while maintaining privacy across family lines. As part of our financial planning process, we are able to project future net worth and discuss strategies on how to transfer wealth to family or charities, from simple outright gifts to more sophisticated estate structures. We can also tailor portfolios to plan for today and later in life based on fluctuations in tax brackets. Our team stays educated on shifting policies that may impact advice.

**Speaking of business owners, what unique challenges do you see these types of clients facing, and what can WAM do to help?**

Business owners live two intertwined lives, their own and their business's. As business owners ourselves, we know the importance of holistic planning and considerations businesses face from start up to maturity. Over the course of a business lifecycle, goals and needs change; our team provides dynamic and adaptable strategies to meet business owners where they are. Our clients are able to delegate advice and portfolio management to our team, allowing them to stay focused on growing their business. WAM has expertise in succession planning, estate and tax strategies and the intersection with generational planning. The value of intimately knowing the interplay of client, family, and business alongside human judgement remains paramount.

**You mentioned human judgement. It's no secret that AI is everywhere. Has this changed how you deliver advice and build portfolios?**

As a boutique firm, we continue to create custom portfolios for clients in-house without using models or AI. This allows us to tailor our investments to each clients' risk tolerance, liquidity needs and tax situation. We also have found that AI has not surpassed human discernment when it comes to delivering advice for nuanced client situations. It's not a "one-size-fits all" solution. Like most businesses, we are continually exploring technology as a way to enhance the services we provide to our clients, though our focus is to always have real conversations with the people we work for. The most important thing a client can understand is that they are hiring a team of professionals that will work to meet their goals with customized portfolio and planning specifically designed for their needs.

**How does Weatherly leverage other professionals when working with clients?**

Weatherly works alongside our clients' team of professionals to develop the most comprehensive solutions possible. We've found overtime that the most successful outcomes are found through cohesive advice across disciplines, including estate, tax, and business guidance. Our clients benefit from their team of professionals working in tandem to implement strategies holistically, and consistently, in pursuit of their goals. Additionally, our team intentionally nurtures a diverse network of local professionals in the event a client may require input from an outside expert. Creating and maintaining an open line of communication with the wider business community ensures our clients have access to the professional resources they need as their priorities and goals evolve over the course of our relationship.■

**BRENT ARMSTRONG**
**Wealth Management Advisor, Partner, Weatherly Asset Management**

Brent Armstrong joined Weatherly in 2007 and became a Partner in 2015. His blend of experience, education, analytical skills, creative thought processes and humor contribute to his service-focused efficacy as a team leader, professional, and trusted expert in our community and overall industry. A strategic thinking direct communicator, Brent acutely understands clients' and prospective clients' goals and concerns. He leads the next generation of WAM advisors in portfolio construction and delivery of highly customized financial plans. Brent steers the Firm's investment committee along with the Founding Partner, perpetuating Weatherly's core value of continuing client and team education.

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