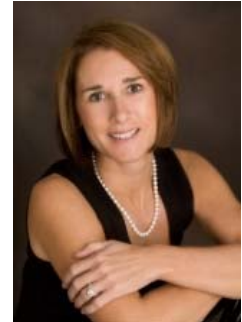


Eyes Wide Open

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At times it can be difficult overcoming the challenge of not being in the same room with our colleagues and their clients during the delivery presentation of a Family Wealth Diagnostic or our more complex deliverable, The Family Wealth Goal Achiever. We are a virtual company. We leverage technology to deliver our services and train our advisors in working with high net worth clients and their team of other professionals.



We have overcome these obstacles in a major way by building and establishing trust in our relationships. There are four major factors that help us build trust.

The first is **integrity**. Are you more concerned about what is right than in being right? Can you act on good ideas rather than having the ideas? Do you use collaboration while leveraging the intellectual capital of all? Are you open to considering different points of view?

The second is **intent**. Are your motives straightforward? Do you genuinely care for those that you serve, interact with, or lead? Do you have an abundance mentality?

The third is **capabilities**. Do you have the ability to inspire confidence? Can you use your talents, skills, knowledge, and attitude to produce results?

The fourth is **results**. Can you perform? Do you over deliver? Do you have a proven track record that demonstrates that you can get things done?

Integrity and intent are matters of character. Capabilities and results are matters of competence. These elements, when brought together, pay big dividends. When you focus on work using effective collaboration and execution, along with positive partnering in relationships, inspiring creativity and innovation with the use of helpful systems and processes, then and only then, can you enjoy the fruits of your labor.

Recently, we were engaged by a financial advisor, who had a long term, very trusting relationship with his client and with the client's team of advisors. This client had a net worth of over \$25M. The client's attorney of many years specialized in real estate law and some business law. The CPA was relatively new to the relationship.

The goal was to produce a Diagnostic and Goal Achiever that would meet the complex needs of the client by collaborating with the team and then to gather the group together

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with the client to deliver the results. The financial advisor was asked to gather the team at an off sight location with the understanding that the Goal Achiever would be presented by InKnowVision, using virtual tools.

The financial advisor was invited to spend the day before the meeting with the client family on an intimate level. This proved incredibly valuable. The night before the meeting, the financial advisor reviewed the overall plan with the client and gathered the client's questions and concerns.

During the meeting, there was a perceived lack of **integrity** and **capability**, as well as visible signs of self interest which ultimately produced a poor result at the outcome of the meeting. The attorney and the CPA were not acting in the best interest of their client. Perhaps they felt threatened. They were outside of their area of expertise. With his eyes wide open, the client caught the attorney and the CPA rolling their eyes during the presentation. In an instant, trust was broken. The financial advisor could see the change in the client's perception of his other advisors.

Being virtual can have it's drawbacks. However, in this case, it was critical to the success of the presentation. The ability to listen to what was happening rather than being able to see what was being acted out allowed InKnowVision to help the group bring the focus back to the client. The client very quickly saw that his "team" was not acting in his best interest and immediately put a stop to it. He gave them a choice. "Work together to get the plan completed quickly or be replaced." The jury is still out.

This situation can happen to any professional advising team and their clients. We know. We have seen it happen time and time again having served over 450 families and advisors over the past 5 five years. The biggest losers are the clients. The choice is yours. The outcome can be different. Employ, embrace, and live the four core principals of trust. You will reap the dividends for years to come.

"It has been a wonderful growth experience to be part of the group. Prior to InKnowVision if I ran into someone with a high net worth, I minimized my contact and potential because I was afraid of lack of capacity to know the answers, what to say or even what to do. So most slipped by and were lost. Today I know that no matter who I run into I don't even have to flinch about our capacity and ability because we can work together on cases. Some of the benefits I received are;

- knowledge that my intellectual capital capacity was increased ten fold
- the skill at which InKnowVision can handle conversations with professionals and clients is unbelievable
- just to listen to and be able to know the people in this community is a growth experience and privilege in itself
- the resources that you offer and introduce us to are phenomenal

Thanks for letting me be part of what you are."

Wayne von Borstel, von Borstel & Associates, Inc., Oregon