



Photo: Taken by Maryann Fernandez in HoiAn, Vietnam (1995)

The Curious Edit is a fresh lens on the creative work and human connections that define an expansive life.

In this month's issue.

PURPOSE

“The Stewardship Shift: Service to Civic Leadership”

Community service is generous, but civic leadership is strategic. We explore how to align your capital, influence, and vision to move from supporting a strategy to actually shaping it. It's time to rethink what it means to truly 'serve' at the table where the future is decided.

PEOPLE

“Curiosity + Transitions”

Major life events aren't just financial milestones; they are emotional marathons. We're diving into the “transition gap” with Susan Bradley (The Sudden Money Institute, Financial Transitionist Institute) to look at why we need more than just technical expertise when life shifts.

PLACE

“Going Solo”

Solo travel has evolved from a fallback plan into a deliberate pursuit of adventure and transformation. It's no longer a concession for the companionless, but a choice for the explorer - because the most profound journeys happen when no one else is there to define the experience for you. (The photo above is from a solo trip to Vietnam in 1995)

I'm building this for you: tell me what I should lean into next.



The Extended Edit

PURPOSE

Check out other resources from The Confident Company
<https://confidentcompanyus.com>

PEOPLE

Access the entire conversation with Susan Bradley, The Sudden Money Institute / The Financial Transitionist
<https://thecuriousphilanthropist.com/curiosity-transitions>

PLACE

For more travel inspiration, follow us!
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PURPOSE

The Stewardship Shift: Service to Civic Leadership

Community Service Is Generous. Civic Leadership Is Strategic.

If you ask someone how they give back, they'll likely mention volunteering, donating, sponsoring events, or serving on a committee.

And that matters.



Community service is often where philanthropy begins. It's visible. It's relational. It reflects generosity and care. But for those who steward capital, influence, and long-term vision, there's another level of impact that deserves equal attention.

It's called *civic leadership*. Community service meets needs today. Civic leadership shapes the systems that determine tomorrow.

Both are essential. But they are not the same.

Community Service: Responding to Need

Community service focuses on immediate impact. It looks like:

- Writing a check to support a program
- Sponsoring a fundraiser
- Mentoring emerging leaders
- Volunteering expertise
- Serving in short-term roles

It asks a powerful question: *What can I do right now to help?*

For philanthropists and wealth advisors, this often means responsive generosity — meeting urgent needs, supporting trusted organizations, and mobilizing resources quickly.

Nonprofits rely on this. Communities benefit from it. But if you've ever wondered why the same organizations are addressing the same challenges year after year, you're already thinking more strategically.

Civic Leadership: Shaping Systems and Strategy

Civic leadership asks a different question: *How do we influence the conditions creating these needs?*

It moves from transactional giving to transformational stewardship.

Civic leadership looks like:

- Serving intentionally on a nonprofit board
- Guiding long-term strategy and sustainability
- Safeguarding mission and governance integrity
- Asking disciplined questions about outcomes and accountability
- Aligning capital with measurable impact
- Advocating for structural or policy change

For those who manage capital — whether personal, family, or client — this is where influence multiplies.

Decisions made in boardrooms shape funding priorities, organizational resilience, executive leadership health, and ultimately, community outcomes.

If community service is generosity in motion, civic leadership is stewardship in action.

Why This Distinction Matters Now

Nonprofits are navigating increasing demand, financial volatility, workforce challenges, and heightened expectations around transparency and impact measurement.

In that environment, more dollars alone do not guarantee better outcomes. Stronger governance does. Clearer strategy does. Accountable leadership does.

Because generosity fuels programs. Stewardship sustains institutions.

The Shift: From Donor to Civic Leader

Many philanthropists already serve faithfully. The invitation is not to do more — but to go deeper.

That shift often looks like:

- From Supporting Strategy to Shaping Strategy. Engaging in conversations that determine direction, not just funding them.

- [From Funding Programs to Strengthening Governance](#). Understanding fiduciary duties and board accountability.
- [From Passion-Driven Giving to Systems-Level Thinking](#). Evaluating root causes, sustainability models, and measurable outcomes.

Board service is not volunteering with a title. It is stewardship of mission, resources, and public trust.

A Final Thought

Community service is generous. Civic leadership is strategic.

One gives time and resources. The other gives direction and oversight. The most enduring impact happens when both are aligned.

If you feel called toward deeper influence — toward the tables where governance and long-term vision are shaped — that may be your next chapter of service. Not just participation. But stewardship.

And stewardship, when practiced well, transforms communities for generations.

DAWN ROCHELLE + CRAIG WAGNER



Founders of The Confident Company + authors of "The Confident Board Member"

Practical resources specifically for those who want to serve well. Their work equips board members, philanthropists, and civic leaders to understand governance, fiduciary responsibility, and the behaviors that strengthen long-term mission impact.

PEOPLE

Curiosity + Transitions

We often think of “transitions” as the headline moments — an inheritance, the sale of a business, a retirement, a divorce. Susan Bradley reminds us that transition is far more universal than that. It’s woven into everyday life.



In fact, while nearly 70% of people hire an advisor because of a life event, more than 80% leave by year two. That gap speaks volumes about how deeply we need better support - not just financially, but emotionally and

relationally — during times of change.

Another powerful insight: transitions take time. On average, it can take up to five years to fully settle after a major life event. In a culture that craves clarity and quick answers, that’s a humbling truth. Susan encourages us to normalize not knowing — to see curiosity as a skill, not a luxury. When we resist the urge to rush toward certainty and instead live in the questions, we create space for reinvention.

We also explore the importance of a trusted “brain trust” — the small circle of people who truly understand you and can hold space as you sort

through options. For advisors, Susan offers a gentle but profound reminder: be the expert in your discipline, but never assume you are the expert on someone else’s life. Real trust is built when clients are given room to articulate what matters most, in their own way and in their own time.

And, of course, we touch on philanthropy. In moments of transition, giving can reconnect us to our values, introduce us to kindred spirits, and help us reset our anchors. In that liminal space between what was and what’s next, purpose often re-emerges in surprising ways.

Susan left us with a beautiful question: *What do you feel ready for?*

It honors timing. It honors process. And it reminds us that not being “there” yet is not failure - it’s simply part of becoming.

SUSAN BRADLEY

Founder, The Sudden Money Institute + The Financial Transitionist Institute

Access the interview here: <https://thecuriousphilanthropist.com/curious-conversations/f/curiosity-transitions>



Going Solo



It was 1995, and I was determined to see Vietnam before it opened up to the world. Never mind that there was no US representative office and non-existent tourism infrastructure, it was an idea that energized me. No one I knew was even remotely interested in coming along!

So, I conned my father into buying me an airline ticket, bought a Lonely Planet guidebook, and booked a couple of hotels. I was either *really brave* or *really stupid!* Either way, I somehow navigated buses, a few flights on old Russian aircraft, leaned on some high school French, and hitched a ride to Hanoi with a group of young Thai tourists. It was tough, lonely, not relaxing, but it was a revelation in countless ways.

Decades later, solo travel is no longer a fringe choice or a post-breakup cliché. It's one of the most durable travel trends of the past decade — and it continues to accelerate.

Why people are choosing to travel solo

- Autonomy is the luxury. No coordinating schedules. No compromises. Solo travel lets you design your day, your trip around your own curiosity.
- A reset during transition. People often travel alone during moments of change — after a career shift, a divorce, the kids leaving home, or before a milestone birthday. A solo trip creates space to think, to recalibrate.

- Confidence and capability. Figuring things out on your own - from missed trains to language barriers - builds resilience. That competence lingers long after you return home.
- Deeper immersion. Without a companion, you tend to engage more - with locals, other travelers, and your own reflections. The experience can feel more immersive and personal.
- Intentional indulgence. Some solo trips are deliberately restorative - wellness retreats, or extended stays at properties designed for contemplative travel. There are increasingly curated options for solo-friendly experiences: communal dining tables, guided excursions, and hosted gatherings that offer connection on *your terms*.

How the experience can be different for women

For women, solo travel often requires an added layer of awareness. Safety isn't an afterthought - it's part of the planning. Research is more considered. Decisions are more deliberate. That vigilance can feel weighty, but it also builds confidence.

There's also a quiet liberation in it. Stepping outside familiar roles — caregiver, partner, executive — and moving through the world accountable only to yourself can feel expansive.

And then there's the internal shift. Navigating a new city alone, solving problems on the fly, trusting your instincts — it awakens something. The trip may last a week or two. The sense of capability and courage lasts much longer.

Sometimes the most meaningful journeys aren't about where you go, but who you become when no one else is there to define the experience for you.

ALONG THE WAY....

PICKING THE BEST LUBERON VILLAGES (PROVENCE)

Stop dreaming of the perfect Provençal escape and start planning it. From the golden-stone heights of Gordes to the hidden, sleepy squares of Vauignes, local travel writer (and my cousin), Jenny Austria Pesnel, mapped out the Luberon's most enchanting corners. Whether you are chasing lavender or a great aperitif, discover which village is calling your name. <https://www.theluberonspy.com/best-luberon-villages-provence/>

