Clarity Before Strategy

During a recent Euclid Harding roundtable, professionals from wealth management, psychology, law, medicine, accounting, education, and executive coaching, reflected on a growing challenge affecting many successful individuals and families: the pressure to move quickly toward solutions before fully understanding the problems they are trying to solve.

Throughout the discussion, participants repeatedly returned to the idea that modern life often rewards constant motion, immediate answers, and reactive decision-making. Yet many observed that clarity — rather than speed — is often the foundation for better long-term outcomes.

In an environment saturated with information, opinions, and increasingly sophisticated technology, the challenge is no longer access to answers - it's knowing which questions actually matter.

Matan Cohen-Citron, a movement specialist, mindset coach, and hypnotist, observed that many people move too quickly towards perceived solutions without first fully understanding the underlying beliefs, pressures, and motivations driving their decisions.

"It's more important to find clarity before we go into strategy," he noted.

The rise of AI tools able to offer seemingly complex and personalized solutions, combined with social pressure and online commentary, often encourages many people to adopt completely the opposite approach to the one Matan recommended. Though access to information has never been greater, it was noted that information without context can sometimes increase confusion rather than reduce it. In fact all the participants agreed that though AI can generate answers almost instantly, it cannot fully understand family dynamics, emotional readiness, long-term goals or the lived realities that often shape important decisions.

Michael Clear, an estate planning attorney at Wiggin and Dana, reflected that clients now often arrive having already researched sophisticated legal or financial structures online, but without having first established the foundational planning to support those strategies.

"You need a foundational plan," he explained. "You actually need boring."

This comment strongly resonated with the group, with everyone repeatedly returning to the importance of slowing clients down enough to focus on the basics before pursuing more advanced strategies.

"From boring," Clear added, "we can build."

Dan Levine, a CPA and advisor to closely held businesses, agreed with this practical approach from an accounting perspective, warning against allowing isolated tactics to drive broader decision-making and not letting "the tax tail wag the dog."

For Levine, the role of an advisor is not simply to identify technical opportunities, but to help clients understand whether those opportunities they may have discovered

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online genuinely align with their overall goals, family circumstances, and long-term plans.

If you're constantly in execution mode — making decisions across your business, your investments, and your family — you may not realize how long it's been since you last stepped back. The issue isn't inactivity; it's that the volume of decisions can crowd out the few that would simplify everything else.

Brian Lasher of Euclid Harding noted that one of the most valuable roles any advisor can play is helping clients to slow down the pace of decision making long enough to prioritize what truly matters.

"If it isn't prioritized," he observed, "it doesn't happen."

In order to achieve this clarity, it's imperative for advisors to ask the difficult and sometimes uncomfortable questions. What kind of life does the client actually want? What responsibilities are they carrying unnecessarily? What goals are genuinely meaningful, and which are being driven by external expectations, or purely habit?

It was noted that clients may have spent years operating in an environment where constant movement and achievement are lauded and rewarded, leaving little space or time for reflection.

Ultimately, participants agreed that clarity creates the conditions needed for better decision-making. When navigating multiple priorities across their personal and financial lives understand what matters most and feel confident in their priorities, strategy becomes far more effective.

But clarity doesn't happen automatically — it typically requires a deliberate process that surfaces underlying constraints, aligns the people involved, and establishes a cadence for decisions and follow-through. Without that structure, even sound strategies can stall or drift over time.

In this sense, modern advising extends beyond the technical: it helps families slow down, gain perspective, and move forward intentionally rather than reactively.