The Role of a Coordinated Advisory Team

During a recent Euclid Harding roundtable, professionals from wealth management, psychology, medicine, law, accounting, education, and executive coaching reflected on the increasingly interconnected nature of modern personal and financial decision-making. While each participant approached client challenges from a different professional perspective, the group repeatedly returned to the same conclusion: no single advisor or discipline can fully address the complexity many individuals and families now face.

As financial, legal, operational, and personal considerations increasingly overlap — often across multiple entities, accounts, and family members — fragmented advice can sometimes create as much stress as the original problem itself. Coordination only works when confidentiality is protected — with client permission and, when appropriate, express written consent.

Our roundtable specialists noted that modern family challenges rarely fit within one domain, and no single advisor can see or solve the full picture. Financial decisions intersect with health, relationships, business pressures, and the dynamics of families managing multiple interconnected priorities, where actions in one area can have unintended consequences in another. When guidance remains fragmented, it can be technically sound yet still fail to reduce complexity — and in some cases can add to it.

Brian Lasher, Managing Director of Euclid Harding, noted that one of the motivations in bringing together this diverse group of advisors was his recognition that “none of us sees the full picture. When collaboration is helpful, we coordinate with the professionals you choose — and we do so using written permission so clients remain in control of what is shared and with whom.”

Participants discussed the value of collaborative advisory relationships — where professionals across different disciplines communicate openly, share perspectives, and help families navigate complex issues in a more coordinated and thoughtful way. Coordination, however, is not simply about assembling a group; it requires a central process for defining the problem, prioritizing decisions, and maintaining accountability across all the moving parts.

The group noted that proactive collaboration may often prevent larger crises later. In practice, that may mean identifying operational vulnerabilities before fraud occurs, or helping families establish healthcare directives and succession plans long before they become urgent — so decisions are made calmly rather than under pressure.

Another theme that was discussed was trust. Jeffery Glick of OCFO noted that business owners often need reliable external voices capable of helping them step back from the day-to-day pressures of running the company long enough to objectively evaluate long term goals.

“A lot of business owners just don’t know who to trust.” He said.

For Glick, building that trust often begins with honesty and transparency, even when conversations become uncomfortable.

“You just have to be honest.” He said.

Other participants agreed, noting the importance of clients feeling heard, understood, and supported through periods of uncertainty and change.

> *“Becoming that trusted resource, provides comfort.”*
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> Perry Kalmus

Euclid Harding's Dr. Miki Lasher expanded on this from a behavioral perspective, noting that trust and collaboration are often essential components in helping individuals move from simple awareness to meaningful action.

Founder of AKALA and longtime college admissions advisor Perry Kalmus agreed that this dynamic was also important when families are navigating emotionally charged decisions around education. Parents and students frequently arrive carrying anxiety around making the "right" choice, and having an advisor serve not simply as an expert, but as a trusted guide, is helpful.

"Becoming that trusted resource," he explained, "provides comfort."

The idea of coordinated advisory relationships being most effective when they move beyond isolated transactions and into long-term partnerships built on communication, honesty, and understanding was considered key.

Success Isn't Always Dramatic

Throughout the discussion, participants noted that success in advisory work is not always defined by dramatic transformations or headline-worthy outcomes. More often, success appears quietly — in the reduction of uncertainty, the ability to make calm, informed decisions, and a greater sense of confidence and stability. These outcomes are rarely the result of a single recommendation, but rather the product of consistent cross-disciplinary guidance, structured follow-through, and a clear cadence over time. In many cases, the most meaningful "win" is the absence of avoidable harm: fewer preventable crises, fewer reactive decisions made under pressure, and fewer issues that compound simply because no one was coordinating the full picture.

For Teresa Leigh, founder of Teresa Leigh Home + Family Office, a nationally recognized advisory firm serving ultra-high-net-worth clients, success means stopping fraud, reducing household complexity, protecting families, and solving real underlying problems with clear systems.

For physician Dr. Robert Brody, and mindset coach Matan Cohen-Citron, it's helping people make aligned, informed changes that improve health, function, and well-being by addressing root causes and restoring vitality.

For estate planning attorney Michael Clear, success means helping clients get foundational estate plans in place, resolve family dynamics, and ensure the right people can manage decisions, money, and continuity.

For Jeffrey Glick and CPA Dan Levine, success means helping families and businesses become bankable, improve financial infrastructure, and provide reliable, proactive accounting and advisory support that drives growth and readiness.

For the college admissions advisor Perry Kalmus, success means helping families make informed college choices, reduce fear, and find the best-value path to opportunity, fit, and long-term outcomes.

For Brian and Miki Lasher of Euclid Harding, success means helping families make clear, aligned decisions, reduce stress, and use trusted, holistic support to build healthier, more fulfilled lives.

Ultimately, the roundtable participants agreed that the increasingly interconnected nature of modern life requires a similarly connected approach to advising. Whether navigating business transitions, healthcare concerns, education planning, family dynamics, or financial complexity, the strongest outcomes often emerge when trusted professionals work collaboratively rather than in isolation.

Because while specialization remains essential, no single profession holds all the answers.

The Roundtable Participants

From left to right: Brian Lasher, Dr. Miki Lasher, Matan Cohen-Citron, Michael Clear, Perry Kalmus, Dr. Robert Brody, Jeffrey Glick, Dan Levine. Not Pictured, Teresa Leigh.