

# Why Technical Problems Are Rarely Just Technical

During a recent Euclid Harding roundtable, professionals from wealth management, psychology, medicine, accounting, education, estate planning, and business advisory reflected on a common theme emerging across their work: clients often arrive seeking solutions to technical problems, only for deeper emotional, behavioral and relational dynamics to quickly emerge.

Whether discussing business succession, educational decisions or the management of complex households and family infrastructure, participants noted that many of the important decisions families managing complex financial and personal structures face are rarely purely financial or logistical. Instead, they are shaped by identity, stress, fear, relationships, perception, and deeply ingrained behavioral patterns.

Advisors are often hired to solve a technical issue. What they frequently discover is something much more human underneath.

Dr. Robert Brody, a board-certified naturopathic physician and specialist in gastroenterology, explained that many patients who arrive at his practice seeking help for gastrointestinal issues are struggling with far more than physical symptoms alone.

“The diagnosis is often actually only the surface layer of what’s going on,” he explained. “IBS, for example, is often a name we put on a collection of symptoms. It’s not necessarily the disease.”

Dr. Brody’s work involves stepping back and looking more broadly at a patient — incorporating lifestyle, stress, and environmental factors, rather than simply treating the obvious symptoms.

Jeffery Glick, whose firm, OCFO, helps business owners prepare companies for growth, acquisition, and sale, noted that many entrepreneurs become so focused on running and expanding their businesses that foundational planning just doesn’t happen until problems arise.

“A lot of people,” he observed, “just don’t know what they don’t know.”

This lack of preparation can lead to significant stress, particularly when business owners begin considering succession, sale, or retirement. The group discussed how deeply many founders tie their identities to the companies they have spent decades building, making objective decision-making difficult.

Teresa Leigh, founder of Teresa Leigh Home + Family Office, a nationally recognized advisory firm serving ultra-high-net-worth clients,

shared a generalized example of how quickly complexity can become personal. In a major household project, her team was asked to step in only after costs had escalated dramatically — at which point they uncovered serious gaps in oversight and warning signs that something was not right.

Leigh emphasized that situations like this rarely remain purely financial or operational. Even when evidence points in a clear direction, emotions and existing relationships

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can make objective decision-making difficult. That's where coordinated guidance becomes essential — not just to identify the issue, but to help families work through decisions and follow through, while maintaining strict confidentiality and ensuring any collaboration with outside professionals occurs only with the client's knowledge and consent.

Emotional and lived reality were repeatedly touched upon during

the roundtable, with the group frequently commenting that facts and expertise are not always enough to create change. The client must also be emotionally ready to confront difficult realities and make decisions that may challenge their sense of identity, security, or control.

As Dr. Miki Lasher of Euclid Harding observed, “If you just tell them what to do, they might not do it. In fact, they're probably not going to do it.”

Instead, she emphasized the importance of helping clients fully understand the patterns and beliefs influencing their decisions so they can begin to develop genuine internal motivation to change.

Perry Kalmus, founder of AKALA and longtime college admissions advisor, brought a story to the group of a student with acceptances to two Ivy League schools, but with little to no financial aid, while another university offered a full scholarship. The prestige and pull of the Ivies were very real to the student and their parents, but would have saddled the young

person with enormous debt before even undertaking a postgraduate degree. Ultimately, after extensive discussion about long-term debt, the student, who wanted to become a doctor, chose the scholarship route for undergraduate.

This story highlighted how some of the most important decisions families face are rarely purely financial calculations. Instead, they often involve navigating aspiration, perception, fear, identity, and competing visions of success.

Overall, the conversation suggested that many of the most difficult decisions families and business owners face are not simply technical problems to solve, but deeply human situations to navigate thoughtfully and with care.

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