Legacy, Transcendence, and Collaboration

> *"Clients are universally concerned about their employees. They always try to make sure that their employees are taken care of."*

Brian Fischer

While the closing of a deal may mark the end of a transaction, it's often just the beginning of something more meaningful. In the final part of the roundtable discussion, participants explored how thoughtful planning and collaborative advisory work can help clients pursue personal fulfillment, create social impact, and leave a lasting legacy. Whether through philanthropy, employee care, or multi-generational wealth stewardship, advisors shared how their work has empowered clients to move beyond financial success and toward purpose-driven outcomes that resonate far beyond the balance sheet.

Several examples emerged from the discussion. One participant shared the story of a doctor whose successful sale proceeds enabled him to transition into teaching and consulting, thus giving back to the medical community. Brian Fischer noted that many of his clients take a philanthropic approach, establishing foundations, and even transferring a portion of their business to charitable structures. He also observed that many clients often want to do something to help their employees: "Clients are universally concerned about their employees. They always try to make sure that their employees are taken care of. Whether it's trying to ensure employment

> *“By aligning personal goals with business strategy, we help clients move beyond transactions and toward lives that feel purposeful and balanced.”*

Brian Lasher

afterwards, or making sure that employees have the same compensation levels, same job titles, same benefits, they’re always front of mind.”

These philanthropic desires, as well as other personal business goals, often emerge many years before a sale. David Place shared one example: “I am working with an owner right now who’s saying I want to sell my company in a couple of years. I said, okay, what do you want to do after that? They answered, ‘I want to do something different than what I have been doing. I want to buy a farm/tractor and spend my retirement working outside.’ Planning around goals such as these enables clients to move more confidently, and in a more focused manner, through a sale and onto their next chapter.”

Estate planning was highlighted as another area where advisors can make an impact. Jonathan Canestri explained: “In my estate planning practice, I always like to at least raise the concept of potential charitable gifts in an estate plan… But it’s really rewarding…. We’re, you know, working for something larger than ourselves.”

The discussion also highlighted a broader view of wealth and impact, and the differences in the way different generations view money. Younger generations, it was noted, often think about the impact of money differently to older, more financially-focused owners. “It’s particularly rewarding when someone in my shoes can have multi-generational conversations about how to use money for shared family goals–whether through a family-limited partnership or a foundation–so everyone feels connected and purposeful,” Brian Lasher explained.
Others echoed these sentiments, with Michele Orr emphasizing the importance of having a team of advisors that adds value not just financially but also to everyone impacted by the transaction. The “wealth” that advisors help clients create isn’t only financial, it’s more holistic, and encompasses relationships, purpose, and legacy.

Alongside these client outcomes, it was noted that the advisors themselves derived personal satisfaction from this part of their work. “For me, I also enjoy that I can feel I did something. There’s nothing in it for me. There’s no commission. But if I do it and it’s a home run for a client, I feel like I accomplished something,” said Greg Pepin. John Weidner agreed: “Most of our clients just left corporate America or whatever job they had, they were tired of. Now they’re building something for their family. It’s so exciting. And when they close, I’m so, so happy for them. Genuinely, it’s one of the best things about what we do.”

> *“When our clients close, I’m so happy for them. Genuinely. It’s one of the best parts of what we do.”*

John Weidner