ASK THE ADVISOR

Q. What's the difference between private client services and having a regular brokerage account?

A. One difference between a brokerage account and private client services is in the name: account vs service. A brokerage account tends to be very transactional in nature; that is, buy this stock, sell that mutual fund, and hope to make a profit.

Private client services, in contrast, result from the development of specific personal information learned over time about each client individually.

At Hutchinson Wealth Management Group, we view our relationships with each of our clients as unique. By taking the time to get to know them, we are in a better position to make meaningful recommendations to our clients. That means getting to know about their families; learning about what clients do for a living or if they are retired; discovering what they do for fun—travel? garden? philanthropy? family?

Finally, we discuss how they view money. Is it a resource to be used up or passed on? If it is passed on, will it be to family or to a charity? These and many other questions allow us to develop recommendations that may include investment management, but may also include risk management, wealth transfer, tax planning, and family guidance issues. These are among the most common issues that develop as we learn about what is important in our clients' lives.

Our goal is to use the knowledge we gain about our clients to develop strategies for their long-term success, whatever that may look like. Our overriding goal is to become our clients' most valuable financial resource.

For more information, visit us online at www.hutchinson-wealth.com or call Amy Conley, Director, Private Client Services and Family Office, at 336-856-8414.

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