

## All About the Kids and Peer-To-Peer

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What's the best way to get in good with clients? Through their children, of course. Peg Eddy, president of San Diego-based Creative Capital Management, uses a financial literacy primer to get those conversations started. "We use car-buying and college planning as a springboard toward getting our clients' high school-aged children to think about money in terms of choices and consequences," she explains. Eddy also touches upon the basics of real estate, family businesses, and gifting. "Rather than discussing who gets what in the will, we explore the mechanics of the estate plan," says Eddy, adding that clients are so grateful for the financial foundation she provides for the kids, steady business invariably results.

It's not easy servicing high-net-worth entrepreneurs. They're independent, headstrong and many are questioning their advisor/client relationships this year. "The tendency now is towards self-direction. Wealthy individuals want to get together with peers so they can get unbiased advice when it comes to their own portfolios," said **Jonathan Kempner**, president of **Tiger 21**. By helping your clients connect with other wealthy individuals in the same boat as them, you can win their loyalty. Sometimes you gotta do whatever's necessary to keep 'em happy.