

Client Stories

Laura & Kate



LEGACY
INVESTMENT SERVICES

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A little while ago, **Laura**, a long-time client, reached out to me with a special request. Her sister, **Kate**, had recently lost her husband, who had always taken care of their financial matters. Now, overwhelmed by the responsibility of managing everything on her own, Kate was unsure where to start. Laura asked if we could meet with Kate during her visit to Wisconsin, hoping we could provide her with some much-needed guidance and clarity.

I assured Laura that, “If someone is important to you, they’re important to us.” When Laura and Kate arrived at our office, they were warmly greeted by our admin, who helped ease some of the tension. Kate looked anxious and uncertain, not knowing how to handle her financial future. Slowly but surely, the stress began to fade, and by the end of the meeting, we had turned confusion into a clear and actionable plan.

Once we onboarded Kate, we reviewed her entire financial situation. She had been working with a large firm, but they had only focused on limited areas of her finances, overlooking key aspects. **Kate’s life insurance**, for example, was poorly optimized, and she was overpaying significantly and needed to update beneficiaries. We clearly articulated how restructuring her insurance coverage could save her thousands of dollars, ensuring she was covered while cutting unnecessary costs.

Beyond that, we took the time to involve her children in the planning process, creating a multigenerational plan that everyone could understand. This ensured that Kate's family was on the same page, giving them peace of mind for the future. We even discussed her wishes for philanthropic giving, integrating it into her financial plan so that her legacy would reflect her values. In the end, Kate went from feeling lost to feeling in control. The clear financial roadmap we provided, combined with the savings on her insurance, gave her confidence and reduced her stress. Most importantly, Kate and her family now have a unified financial strategy for the future.

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Grateful

I'm grateful to Laura for entrusting us with her sister's financial journey and proud that we were able to help Kate during such a challenging time.

Helping Families Like Laura & Kate's Every Day

Many people, especially after a life-changing event like the loss of a loved one, feel hesitant to meet with a financial advisor. Whether it's due to worry about debt, a lack of financial knowledge, or fear of being judged, the uncertainty often keeps them from seeking the help they need.

But in our experience, most people are in better financial shape than they realize, and after sitting down for an initial conversation, they walk away with peace of mind. Even if you're not where you want to be financially, having a plan in place gives you direction and confidence.

At **Legacy Investment Services**, we help people like Kate by developing clear, actionable financial plans—whether it's saving on insurance, involving family members for long-term planning, or helping you achieve philanthropic goals. We ensure that you leave feeling more secure about your financial future.



If you or someone you know could benefit from financial guidance and creating a personalized plan, don't hesitate to contact us. We're currently welcoming new clients and are excited to help you achieve your financial goals.