



THE DISTELFINK – Preserving Human Capital Across Generations

April 29, 2009

Sometimes we come across something so exciting, so fresh, so different, and yet so right for the times, that we just want to tell everyone. So here I am about to tell you. I only wish I'd been able to make this discovery while my Father was still alive.

For years my sisters and I urged our Father to share his stories with us in a lasting way. We gave him a Dictaphone and cassette tapes one year for his birthday and encouraged him to talk to us. Tell us about your parents, grandparents, and childhood summers at Cape May. Share with us what it was like to grow up in the Depression, how your Headmaster recommended you for Williams College, your first trip Abroad to France and England, what it was like going to work for your Father after getting out of the Army. Tell us about the first night you met Mom, living in Penllyn, and how Mom helped you to discover the world through her love of travel. Impart your wisdom about navigating the financial markets, running a business, and making a marriage of more than 50 years always look fun and loving – well almost always. But it was not to be. Dad did talk to us individually, and sometimes at family reunions, about the things we longed to hear, but we have no tangible record, nothing to hold on to. How I wish we did. We lost Dad six years ago to a burst aneurism, and there isn't a day that passes that I don't miss him.

If only we had known about Ray Omholt and his company, Legacy Profiles, Inc. Ray is a perennial entrepreneur, whose latest development is a powerful, guided-interview process which helps people recall their most happy memories. Through either a Loving Legacy, or a Lifetime Legacy, a family's matriarch or patriarch can create what so many children and grandchildren would love to have – their family's story, as told by their family. Through a Loving Legacy, a family member can express their fundamental beliefs and values; the things for which they are the most grateful; messages to loved ones about the qualities they most admire; how they would like to be remembered by loved ones; and loving guidance based on discoveries in their own life to each child and grandchild. As much as my sisters and I would have treasured a Loving Legacy, what I would have truly loved to see is our Father's Lifetime Legacy – a more in depth discovery of Dad's happiest memories, greatest successes, most valuable lessons learned, and what our Mother, and each of us, meant to him. I am honored to know Ray, his wife Inka, and their interview facilitators Paulette and Linda. And I would encourage any of you who want to give the best, most lasting gift to your family, to explore their website www.legacyprofiles.com, to learn more about this marvelous process and experience.

Someone I have long admired in the wealth management industry is Jay Hughes. His work with families has been widely recognized for his mission to help them achieve long term preservation of the family's wealth, which he has identified as being comprised of its human, intellectual and financial capital. During a period when it is so difficult to successfully direct the family's financial capital, wouldn't it be an ideal time to invest in a family's human and intellectual capital by capturing the senior, or indeed the middle generation's, wisdom, through a series of Ray's

interviews? What better way for financial advisors to show their clients they want to help and make a positive difference in a family's capital development by introducing them to Legacy Profiles; and what a marvelous way for families to strengthen their bonds of affinity through this extraordinary communications approach. Thank you, Ray, for your persistence and ingenuity in making this possible for so many who will benefit from your great work.

Copyright ©2009 Weightman Wealth Advisory. All rights reserved.