

Emerald Connect | Family-Wealth-Counsel

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So my role at Jacoby Nealon McCain Wealth Management Group is to provide families with financial guidance and clarity across their complex financial needs. Because of the complexities that come with greater wealth, we often facilitate meetings annually and semiannual. So we bring in attorneys, CPAs, as an investment professionals so that we can collaborate to make sure the goals and the objectives of the clients and the families are being met.

We're very proactive in our service. We want to make sure that we reach out, whether it's via email or via phone call. So I would say we tailor our investment advice to each individual family because each family has a different need and a different goal.

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