Podcast Episode 3 – At the Kitchen Table with Graham Jones III

Episode 3 in the series 'At the Kitchen Table' from Momentum Advisory Group

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family's resources to use for future generations.

My father, Graham Jones III was visiting us in Sydney this week, which made it easy to sit down at the kitchen table and talk through his story as executor of his father's estate.

Digging into the application of our family resources revealed a lot about my family story I hadn't heard before. His story is very much a traditional one, delivering the tax minimisation and asset distribution strategy laid out for him. But it's an engaging insight into the challenges that can come even with this basic approach. This story goes all the way back to the Louisiana purchase.

Listen to the episode below:

Download the transcript

Podcast Episode 2 – At The Kitchen Table With Alan Heath

Episode 2, in the series 'At the Kitchen Table' from Momentum Advisory Group

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In this episode I was fortunate to have Alan Heath join me at the kitchen table. Alan has 30 plus years working with families and family offices, and is a guest lecturer at the Harvard Business School Executive Education Program for families in business. I really enjoyed Alan's global perspective and his insights on family governance.

Listen to the episode below:

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Podcast Episode 1 – At the Kitchen

Table with Momentum Advisory Group

Episode 1, in the series 'At the Kitchen Table' from Momentum Advisory Group.

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family's resources to use for future generations.

We are a small family business helping families redefine what it means to be wealthy.
In Episode 1 we talk about our philosophy, what we do, who we are and what our work means to us, and the families we support.

Listen to the episode below:

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