Are you ready to turn uncertainty into growth?

It may seem strange to be talking about growth in these uncertain times. In fact, now is the perfect time.

Amongst the havoc wreaked by COVID, it’s been heartening to see some positives emerge from the pandemic: a strive for greater connection; a surge in community spirit and solidarity.

The crisis has given us cause to stop and reflect on how we live; to examine what really matters to us as individuals and families; to question whether we’re living by our values. As we face increased uncertainty, now is the time to shift our focus to growth and building a confident future for ourselves and our families.

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Read the article

Interview with our client David Orford

David Orford talks with Financial Synergy about the work we are doing to bring his family together and steward its assets.

Tiffany Jones featured in the latest episode of “Inside the Rope”

Listen to Tiffany talk about family leadership with David Clark from Koda Capital, in the podcast series *‘Inside the Rope’*.

Tiffany Jones of Momentum Advisory Group talks about family leadership in the Financial Observer

Tiffany Jones was featured in the Financial Observer talking with Paul Heath from Koda Capital on the importance of family stewardship and the role of family leadership in effective intergenerational wealth transfer.

Excerpt: Jones, who is also a director of family leadership consultancy Momentum Advisory Group, said advisers needed to help bridge the generational gap between baby boomer clients and their millennial children when it came to ensuring a smooth transfer of wealth.

“Historically the children of wealthy families may have gone into the family business or picked up that legacy, but really the new generation don’t want to do that at all,” she said.

“So you often have a principal asset like a business or property that has been sold and that wealth is sitting there just locked up, which is a great opportunity to bring the next generation into the decision-making and allow them to do something with that money that carves out their own space and finds their own purpose.”

Click here to read the full article.