



Croissants & Superheroes

Every Private Advisory Family Office Client gets a full-time personal assistant.



Croissants & Superheroes: What's the connection?

In the days leading up to Mother's Day, our client was on a golf trip and realized his Mother's Day plans weren't finalized. With plans to return Saturday afternoon, he knew he wouldn't have time to get his wife something special. He reached out to his personal assistant for help.

She coordinated with a renowned bakery in Kamas, over two hours away, picked up the items, and delivered them to the client's home. When the client arrived home Saturday evening, everything was in place. On Mother's Day, he woke up looking like a superhero!

If you don't have an assistant – you are the assistant!