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PREPARING FOR THE FUTURE

A high-touch financial advisor team rewrites the script to put clients first.

"We believe in honesty and transparency," says Brynn Morris, vice president and financial advisor with the Eidson, Doege and Morris Team of RBC Wealth Management. "Our team is deeply committed to providing the exceptional service our clients deserve and expect. We're proud to be a responsive, high-touch team of experienced professionals."

The Leawood-based team especially enjoys working with multigenerational clients and has served as advisors and wealth managers for more than 60 years for several client families. First vice president and financial advisor Kyle Doege notes that the Eidson, Doege and Morris Team makes a conscious decision to ensure its team is similarly multigenerational.

"It's important that our clients can relate to us and are of the same generations. It's not unusual for our clients to include parents, children, and grandchildren. What works for the parents may not work for the grandchildren in terms of communication styles and relatability," Doege shares. "A multigenerational team is something we intend to continue building. We are actively planning now for the future so clients can

feel a sense of team continuity, working to help all generations of a family be well cared for financially."

RBC WealthPlan

Another differentiator for the team is the RBC WealthPlan, which is the team's financial analysis capability.

"It's of the utmost importance that we understand our clients' unique objectives and risk tolerance. When we take on a new client, we spend a lot of time getting to know their life goals, family, and financial concerns," Morris says. "For us, it's all about helping clients plan for the future they want."

Designed to help clients flesh out their expectations, preparedness, and concerns for the future, the RBC WealthPlan is an interactive planning tool that accounts for the nuances of each client's lifestyle and goals. Working closely with clients to gather pointed information on their goals and dreams, the Eidson, Doege and Morris Team inputs data into advanced technology that can help predict how a client's investment plan may be impacted by events both anticipated and unexpected, including scenarios of desired

retirement ages, the impact of bear markets, and more.

"It's true that everyone's goals for the future, their wants, and their needs are different from those of someone else," Doege adds. "Furthermore, it's not unusual for those goals and desires to evolve over the years. We work every day with people who want to retire early, people who don't want to retire at all, those who want to live to the fullest after retirement, and those for whom leaving a legacy to their families is most important. With the support of RBC Wealth Management specialists, we work hand in hand with our clients to make such goals a reality."



**Wealth
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